REBATE ninja

User Manual

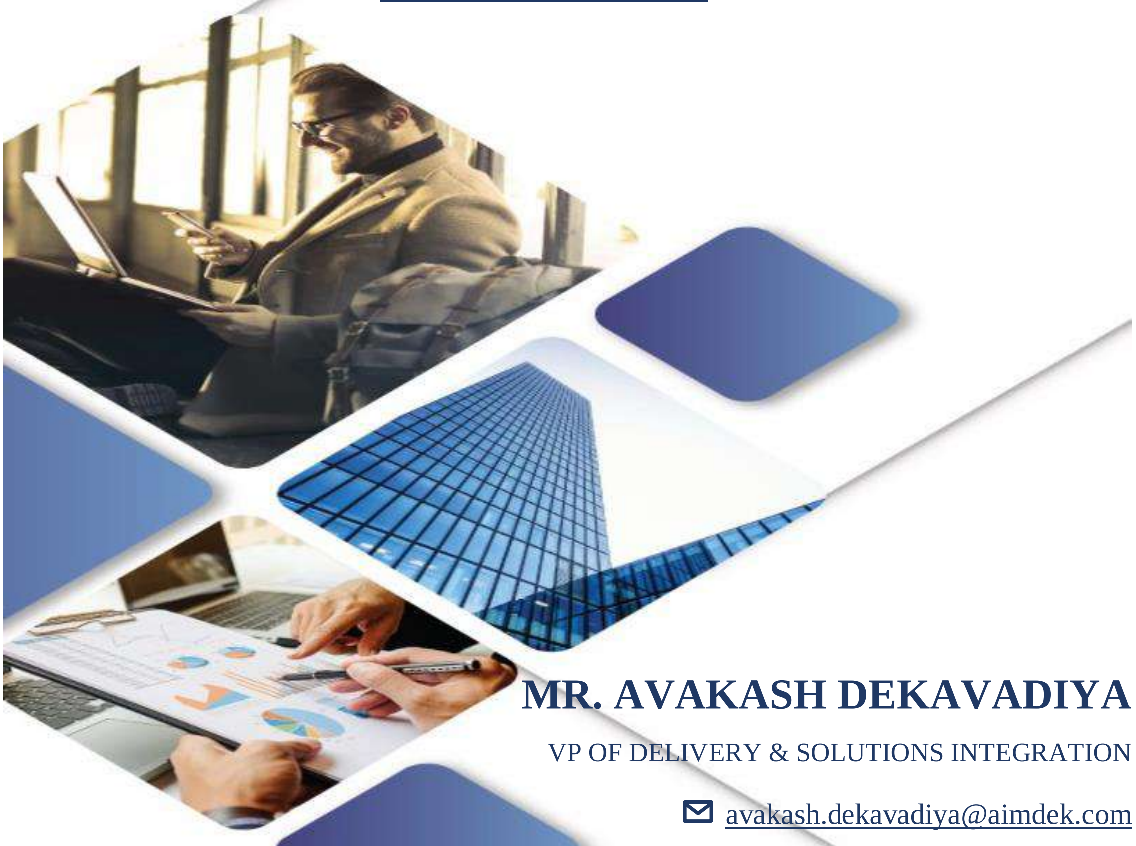

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Table of Contents

1. Introduction

1.1 Document Purpose

The purpose of this User Guide is to explain how to install and use the Rebate Ninja application. The document contains a table of contents, detailed information, images and a frequently asked questions section for better understanding.

1.2 Application Overview

Rebate Ninja is for the manufacturers to streamline the rebate management process.

Refunding a portion of the purchase price is known as a rebate. The purchase of a certain amount or value of items within a certain time frame is often the basis for rebates. Rebates, in contrast to discounts, are issued following the full invoicing of the purchase price.

It includes the rebate program, rebate program members, and all the calculations and approvals related to the rebate program.

The main benefit of this app is to eliminate the manual calculation, review, and approval processes. This will help manufacturers improve their relationships with their customers.

2. Administration

This section will help you set up your organization to start using the Rebate Ninja app application on the web and in Salesfroce1. To set up your Rebate Ninja application, you need to do steps 2.1 to 2.7.

2.1 Install Rebate Ninja application

To install the Rebate Ninja application:

1. Go to AppExchange http://www.salesforce.com/appexchange

2. Search for Rebate Ninja

3. Click the 

button.

4. Click the option Log in to the AppExchange.

5. You can then select to install Rebate Ninja in either Production (includes active, trail or developer orgs) or Sandbox.

6. Select check box to agree the terms and conditions.

7. Click the 

button.

8. Enter your organization credentials.

9. Select installation details (either for Admin Only, All Users, or Specific Profiles)

10. Then click Install.

If the installation is successfully completed, you will see the confirmation message.

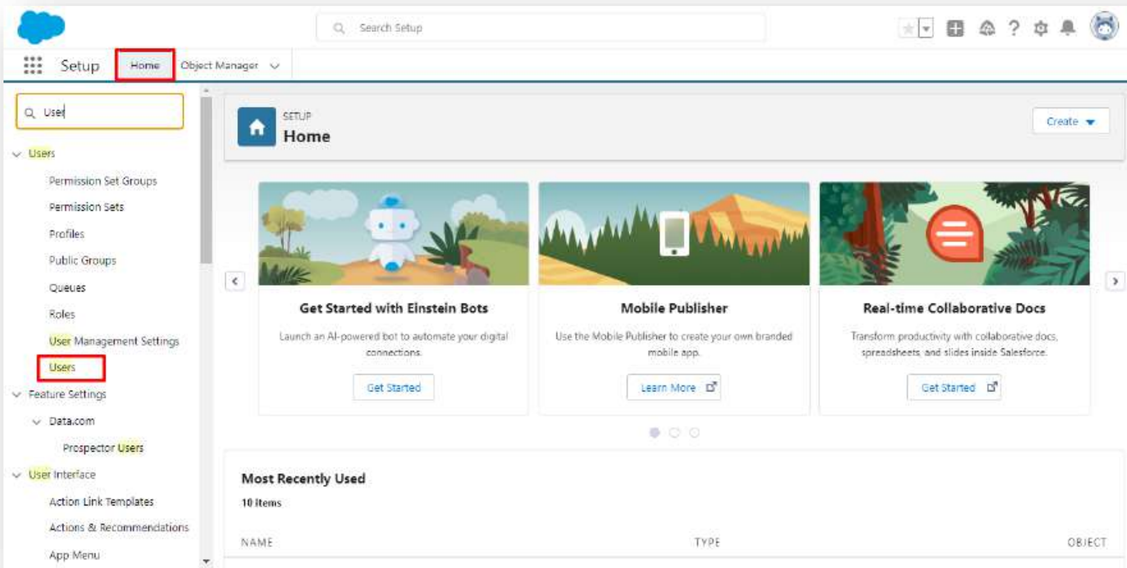
3. Prerequisites

Before using the application, there are some pre-requisites to be followed, there is a need for a user-account. There are two types of main users as below:

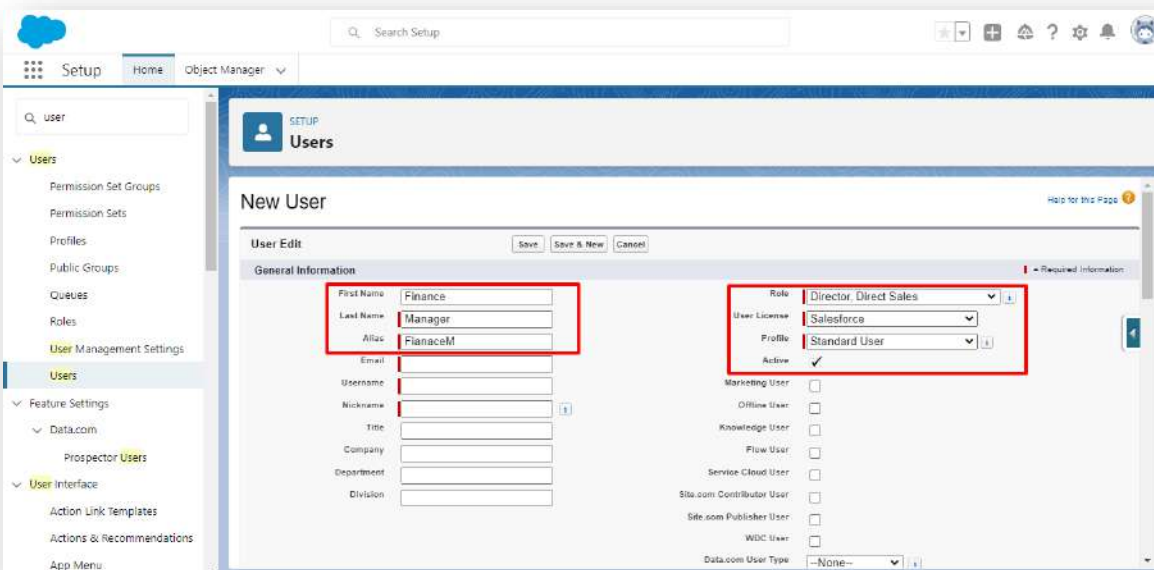
- Admin User (Manager)
- Standard User (Finance Manager)

3.1. Create a User

Administrator user can create new user. In the quick find box under setup, enter "users."

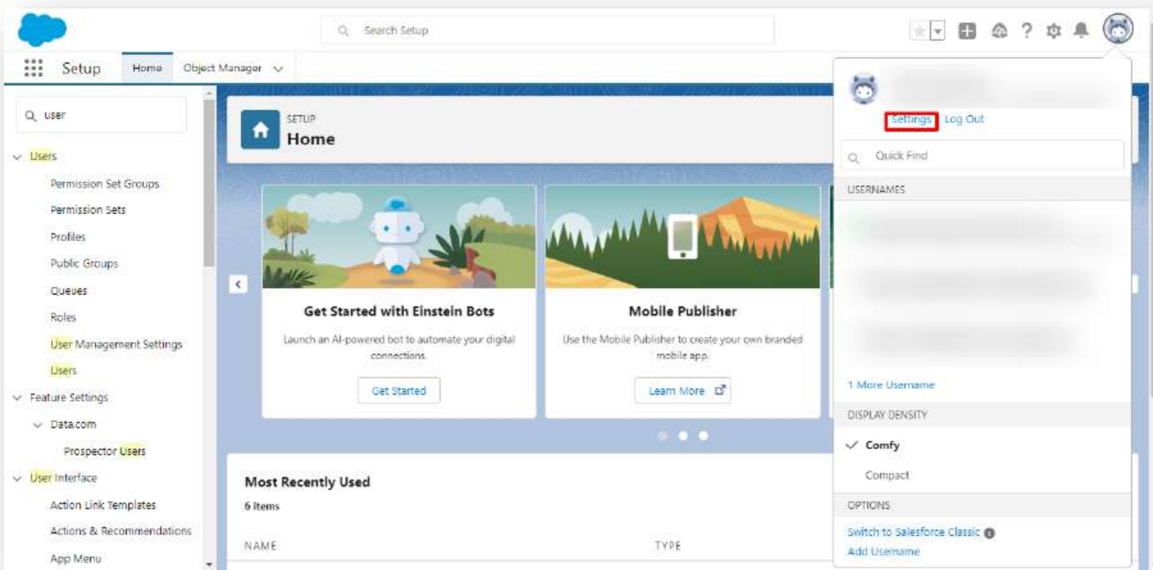


To create a new user account, click the "new user" button and fill out the form with user license, profile, roles, time zone and other details and save the user information.

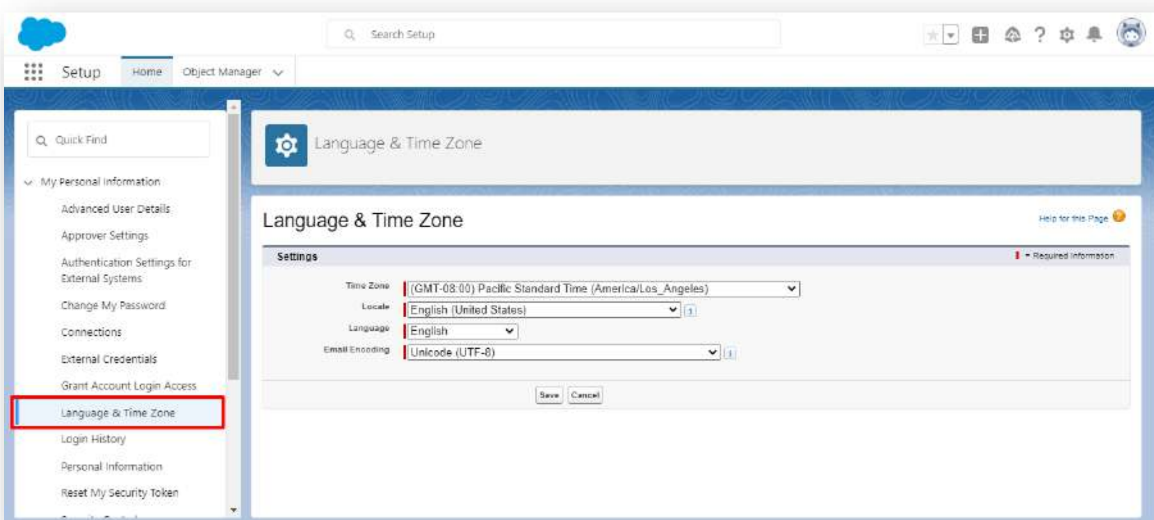


3.2. Set Time Zone of the Org

3.2.1 Click on profile and select setting



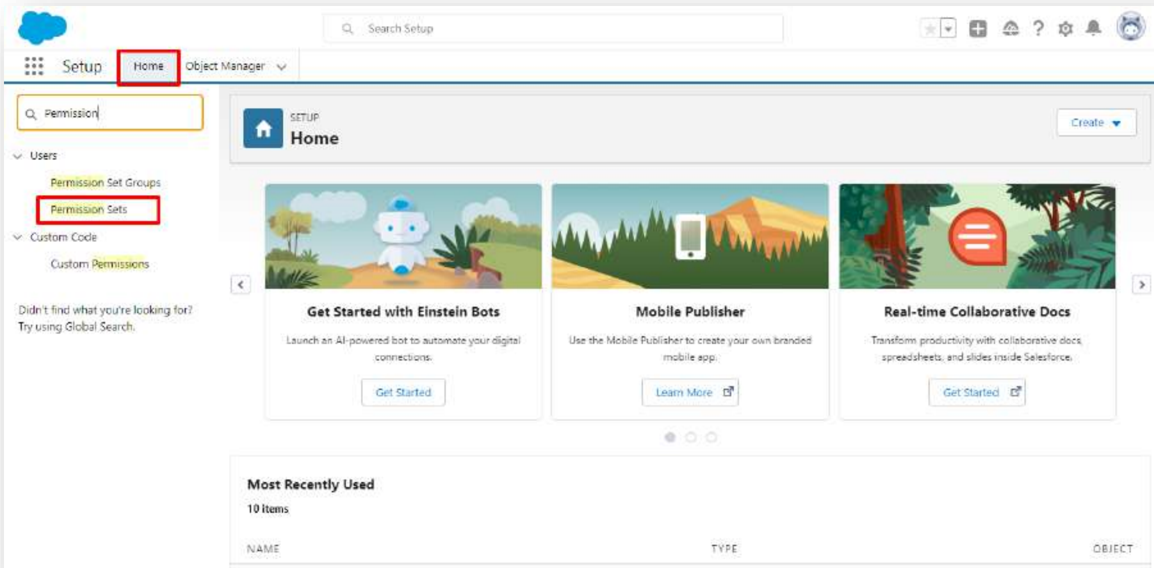
3.2.2 Set Language & Time Zone for your current Org



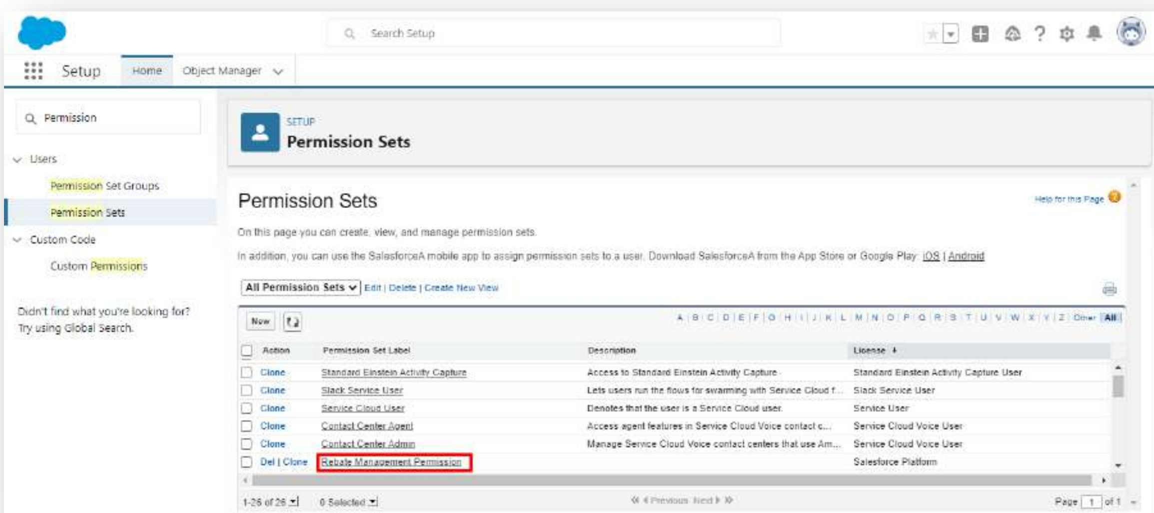
3.2.3 Click on the save button.

3.3. Assign permission set to the user

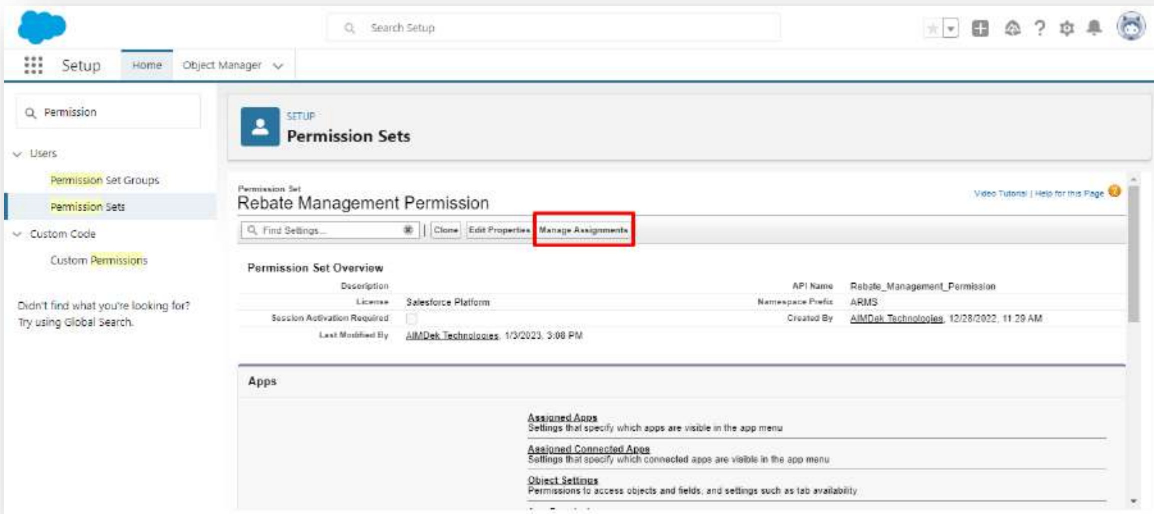
3.3.1 Search 'permission set' in quick find in setup



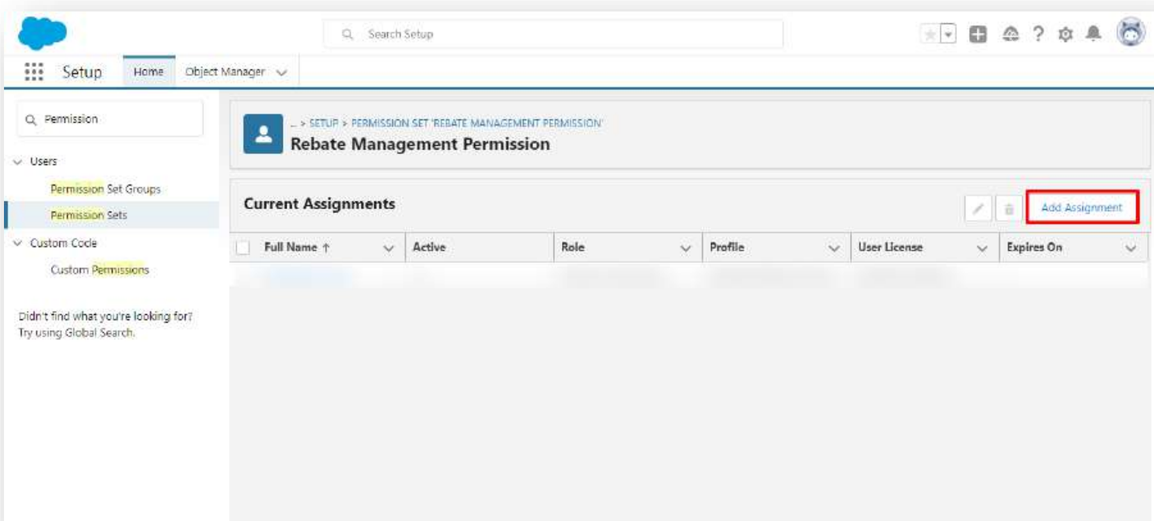
3.3.2 Select Rebate_Management_Permission



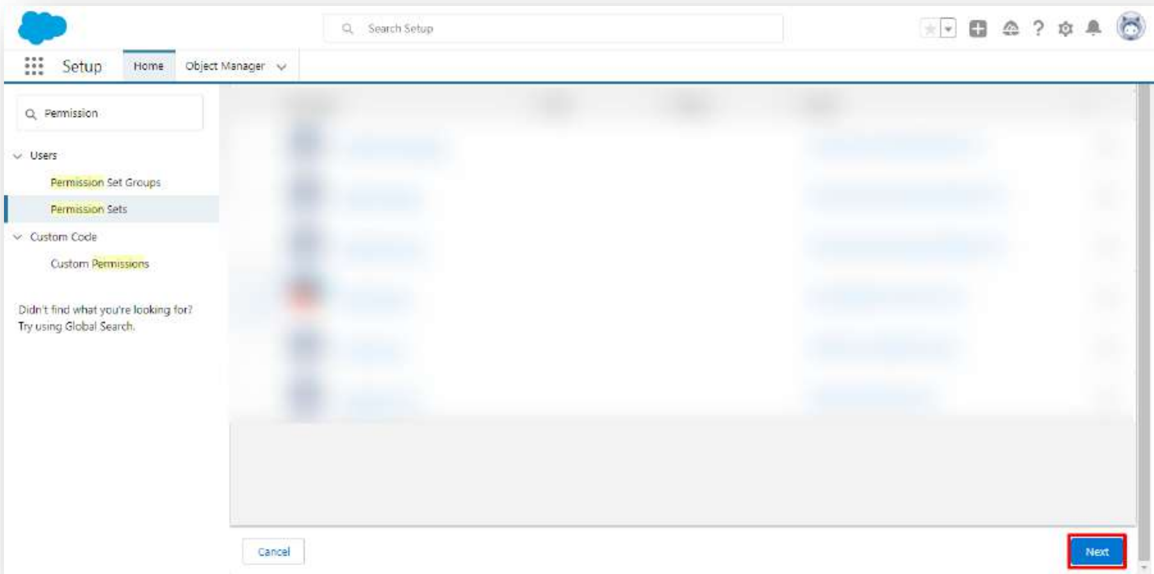
3.3.3 Select Manage Assignment



3.3.4 Select Add Assignment



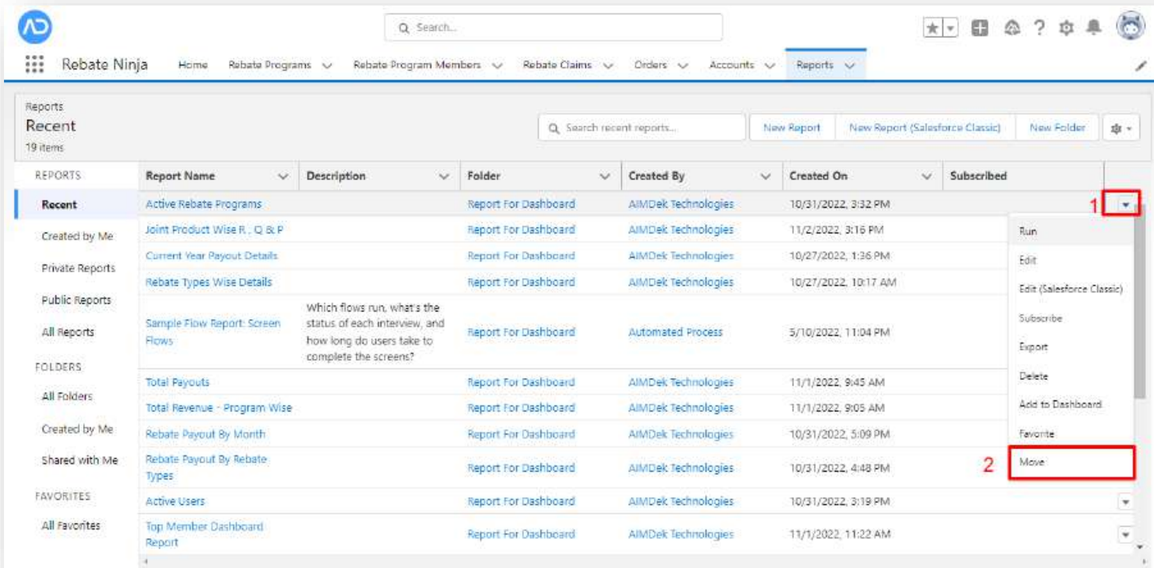
3.3.5 Select the standard user you want to Assign and save.



3.4. Move Reports to the Public Folder

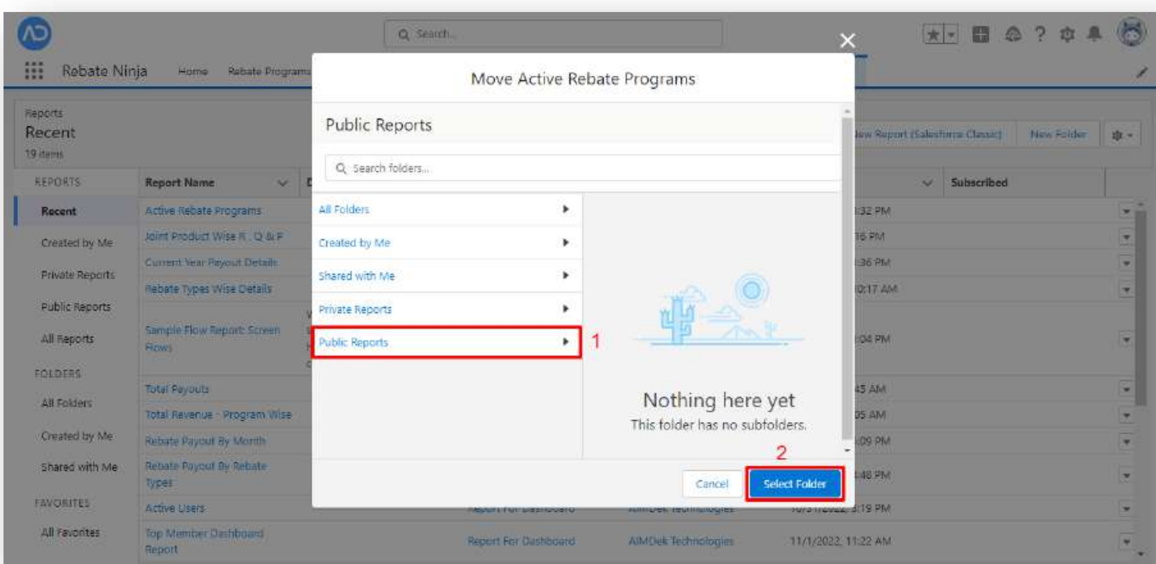
3.4.1. For the Reports section, there is only an “Administrator” who has the right to give permissions to a standard user. By default, only Admin users have the right to view the reports.

Admin User must put reports into the “Public” folder to give rights to the standard user.
Admin users must follow the steps below:



3.4.2. Go to the Reports from Nav bar, there is an option for each report to move it to the "Public" folder.

Click on "Move", select "Public Reports" and click on "Select Folder" button as shown below

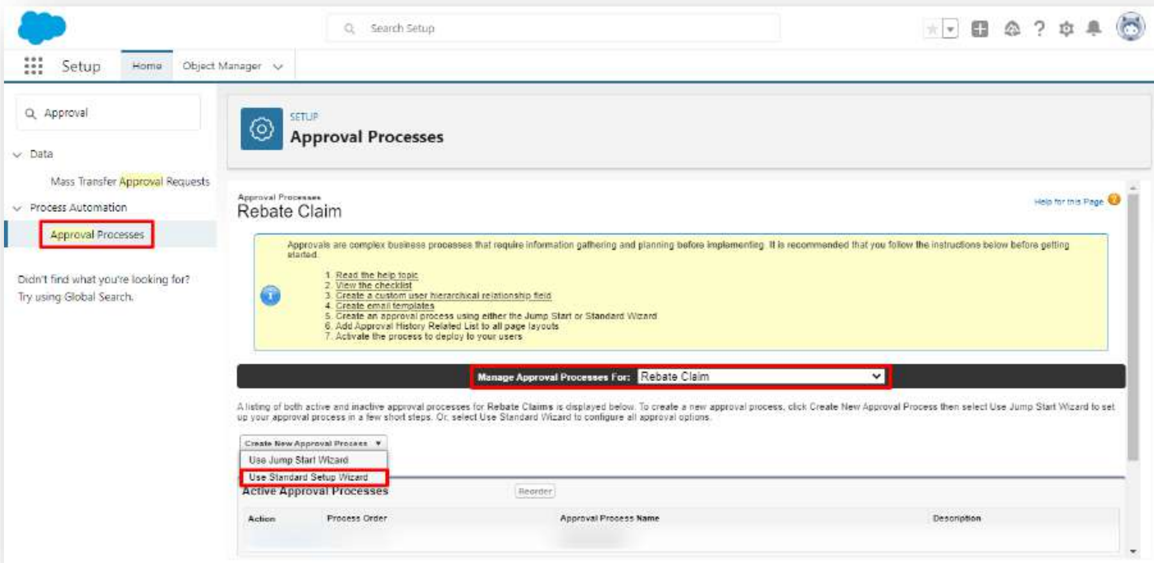


3.5. Create the Approval Process

Users must follow the steps below for the approval process:

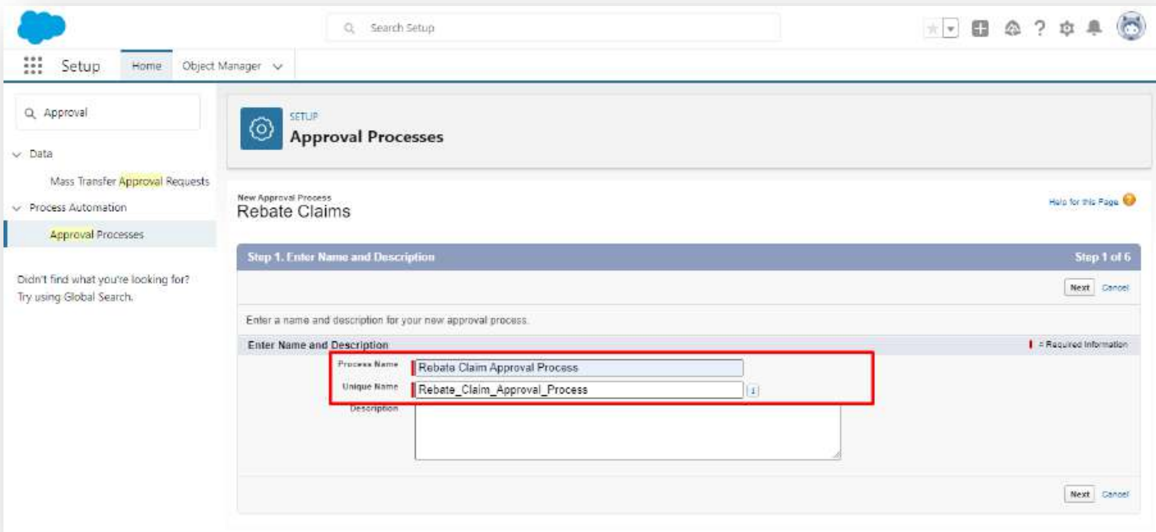
3.5.1 - Go to Setup -> Select Approval Processes -> Click on Manage Approval Processes for Rebate Claim (Custom Object)

- Select ‘’Create New Approval Process’’ button -> Use Standard Setup Wizard



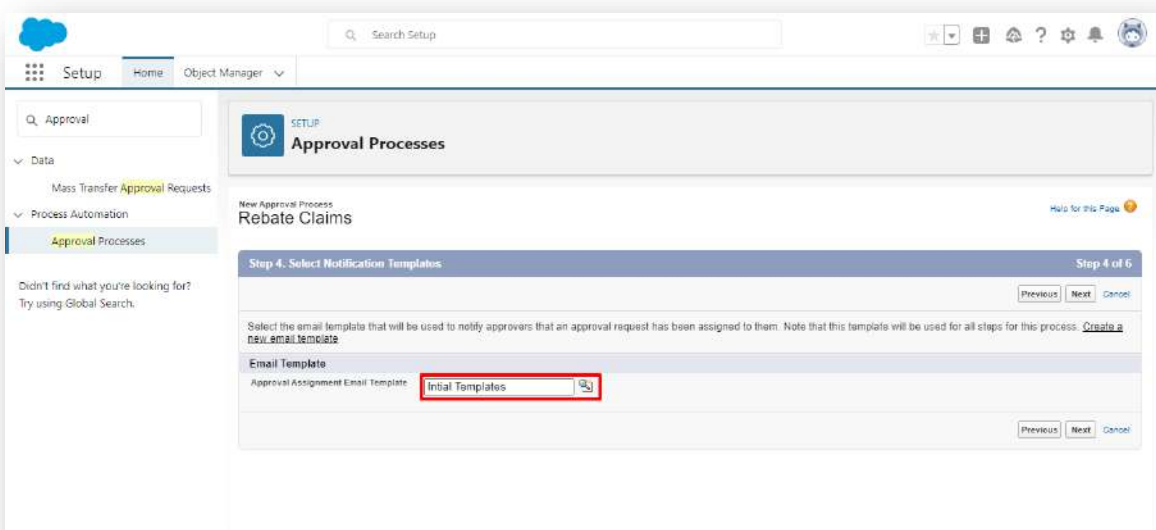
3.5.2 Enter the Process name as it is show in Image

"**Rebate Claim Approval Process**" and the description and press the "Next" button.



3.5.3 Set Specify Criteria as Null and Press "Next".

3.5.4 - Select Template - Classic -> Rebate Management Template -> Initial Templates

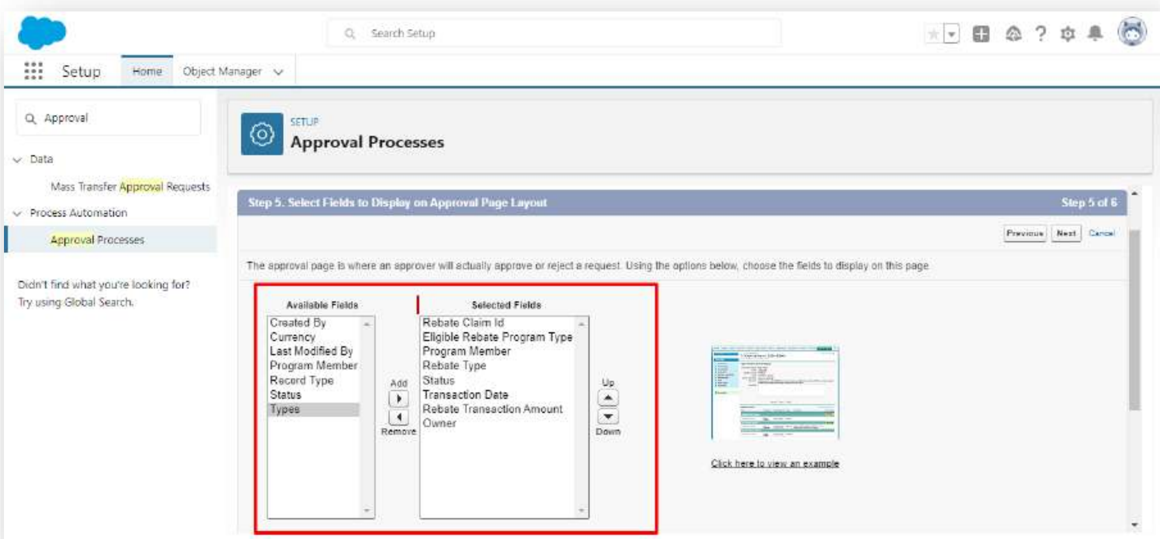


Press "Next" button.

3.5.5 - Select Field To display when user Approved or Reject Claim

* Select Fields and Add

1. Eligibility Rebate Program Type
2. Program Member
3. Rebate Type
4. Rebate Transaction Amount
5. Status (First Status)
6. Transaction Date



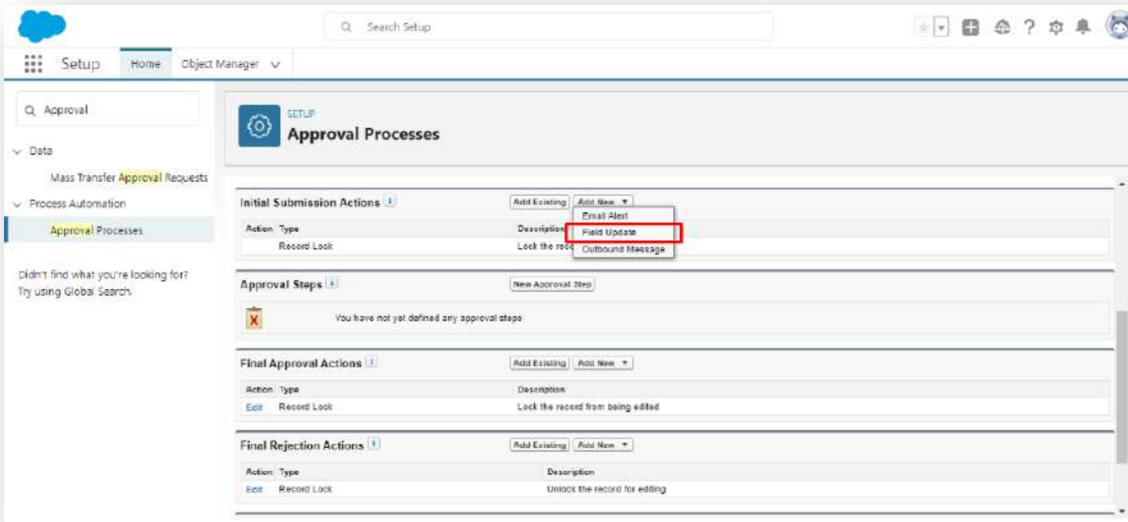
Press “Next”.

-Select “I will do this later. Take me to the approval detail page to review what I've just created.” and Press “Go” button.

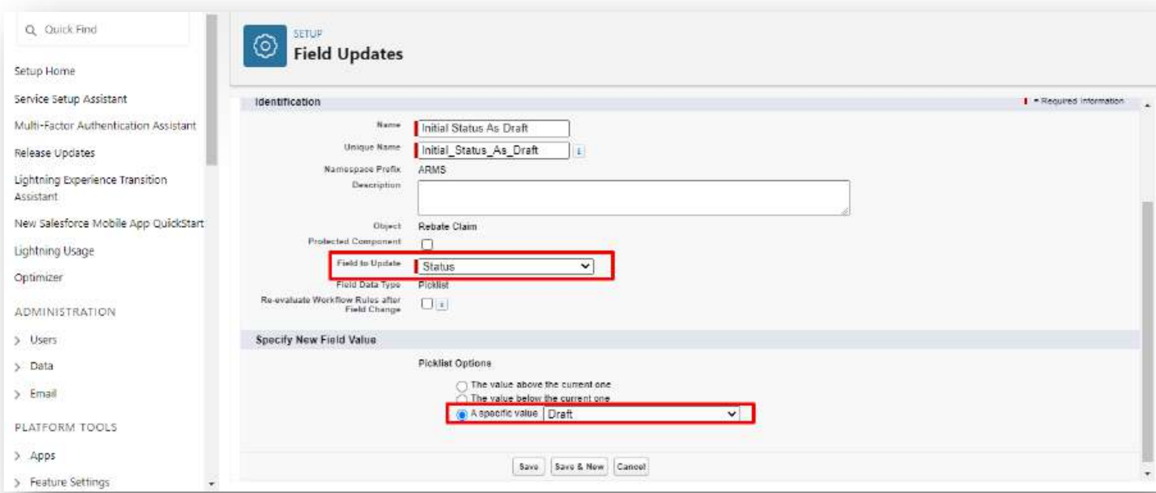
3.5.6 - Add User for Initial Submitters

I. Select Owner in Search and Add Rebate Claim Owner and Press “Next”.

3.5.7 - Initial Submission Actions   ** Click on Add New button-> Select Field Update option*



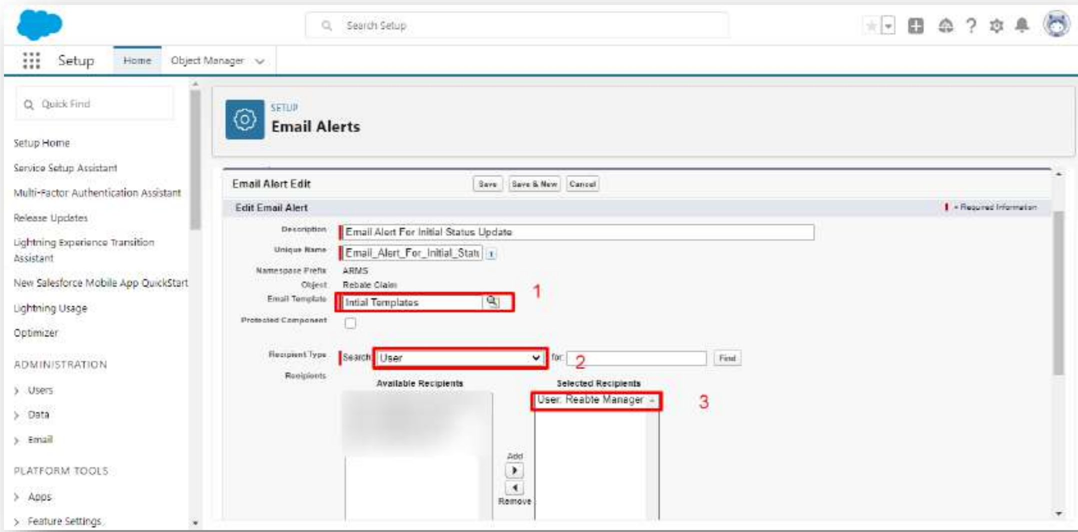
- Name -> Initial Changing Status to Draft
- Field to Update -> Status
- Specify New Field Value -> Draft



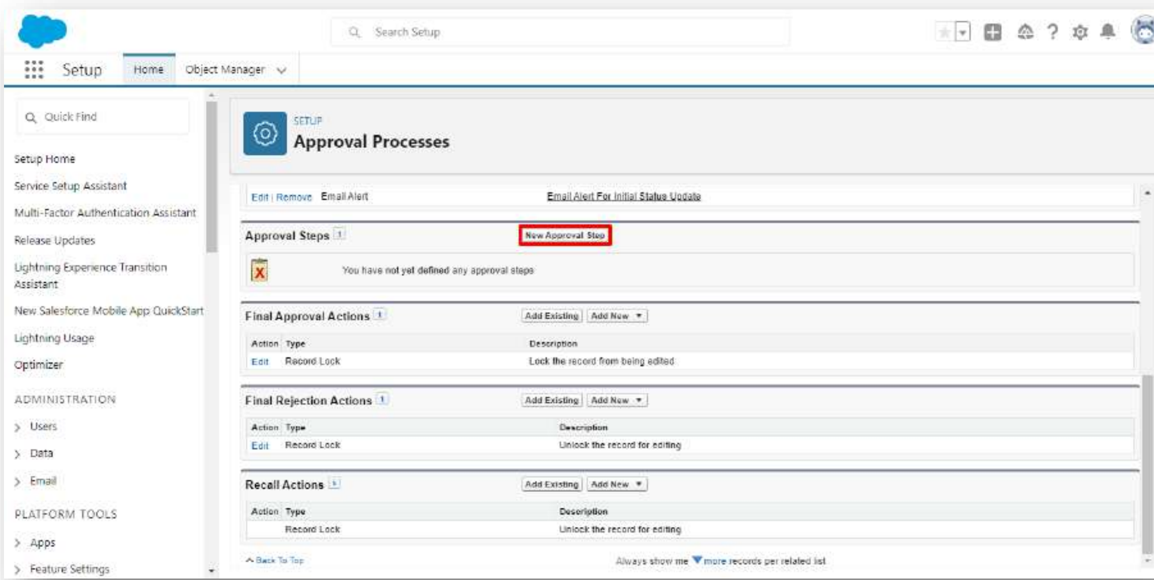
Press "Save" button.

- Add New -> Email Alert
- Enter Description, Unique Name, select Email Template

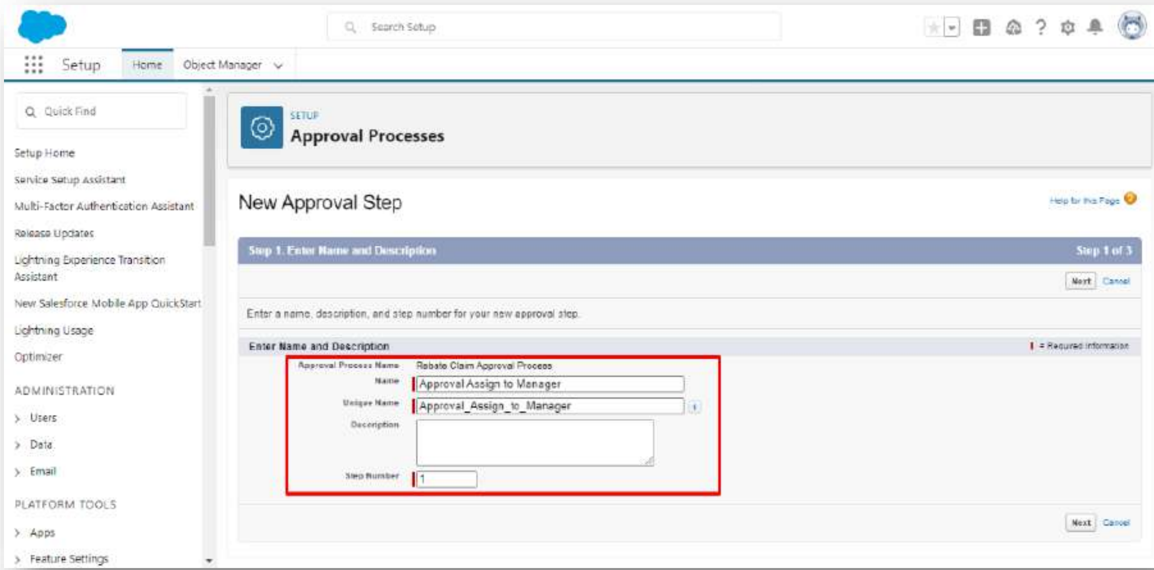
- Search -> User, add Manager to select Recipients



3.5.8 - Next step is "Approval Steps". Click on "New Approval Step" button.

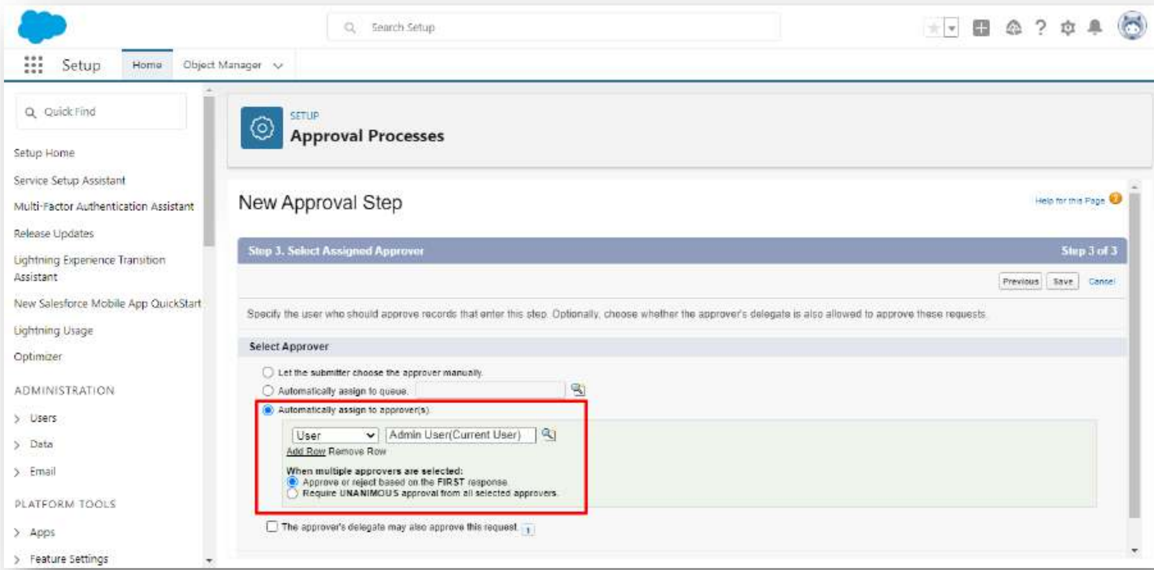


I. Enter "Name" and "Description" and Press Next button.

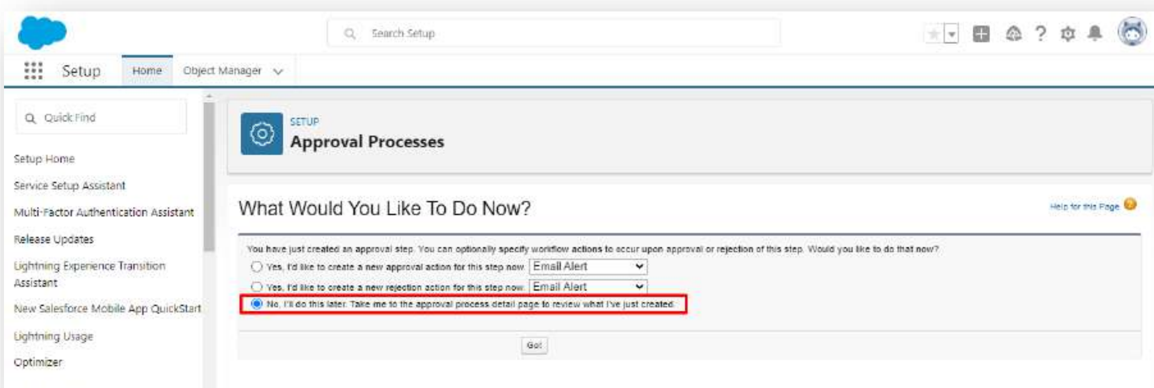


Select Options as mentioned below.

I. All records should enter this step.
II. Automatically assign to approver(s).
III. User and add Admin (Current User or Manager)

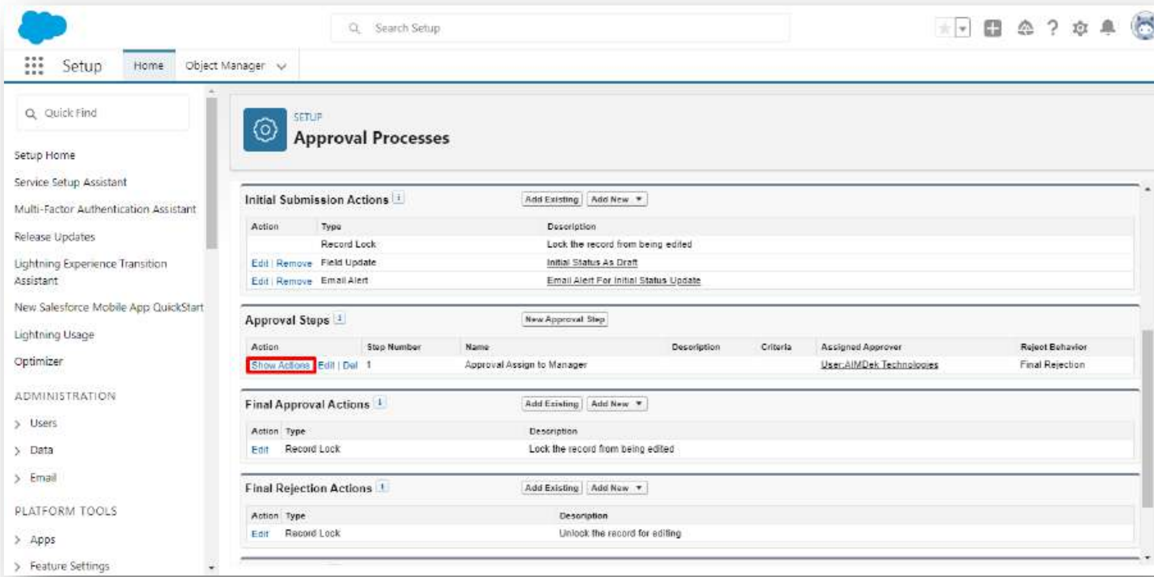


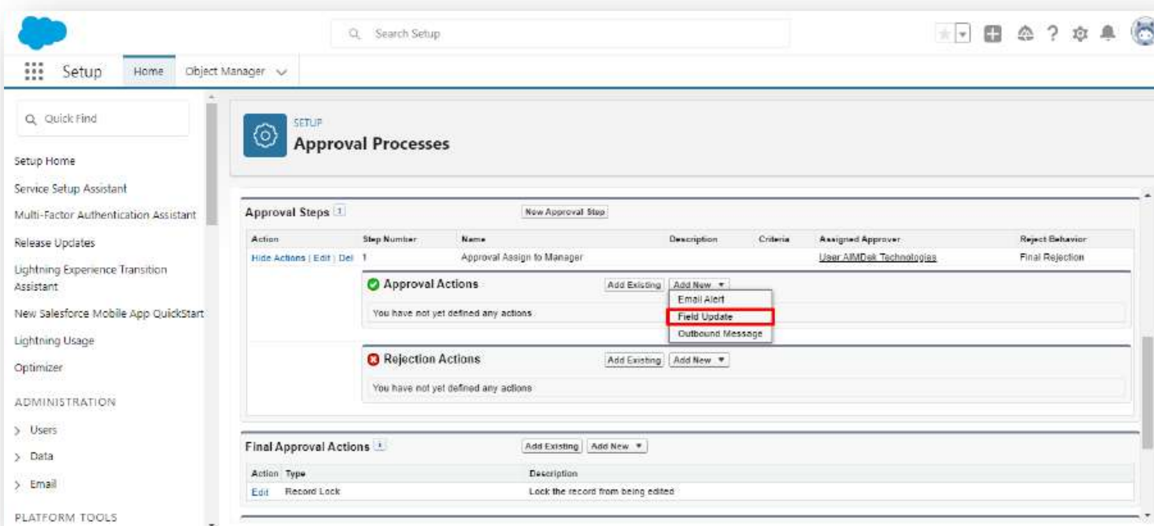
Press “Next” button and system will show the below option and select highlighted option.



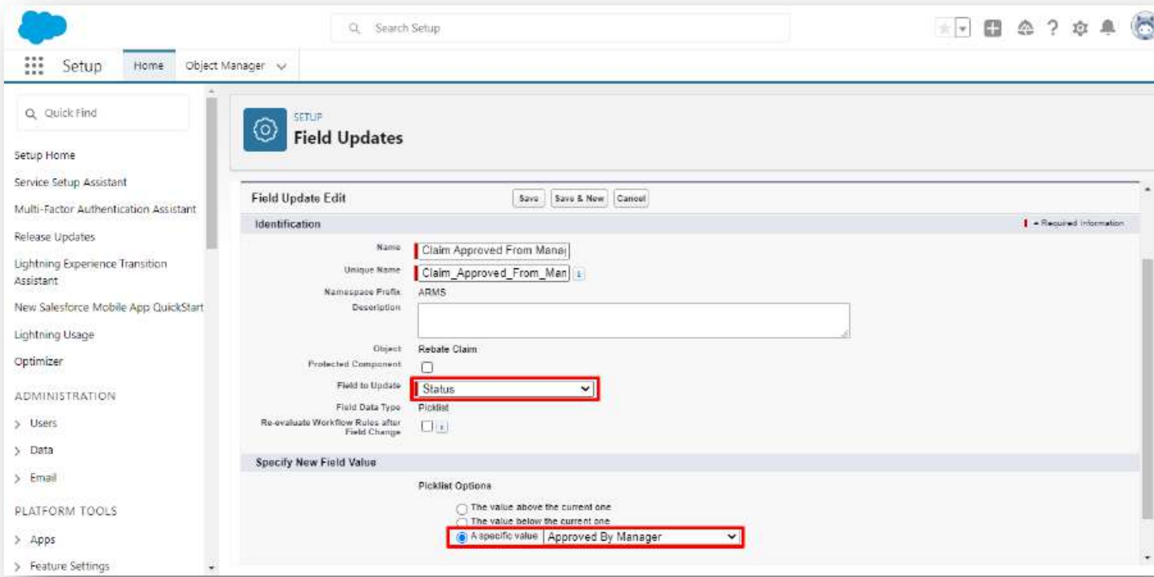
3.5.9 - Update Field Status in First Approval Step

I. From Approval Steps select "Show Action" then Select "Add New" and Select "Field Update"

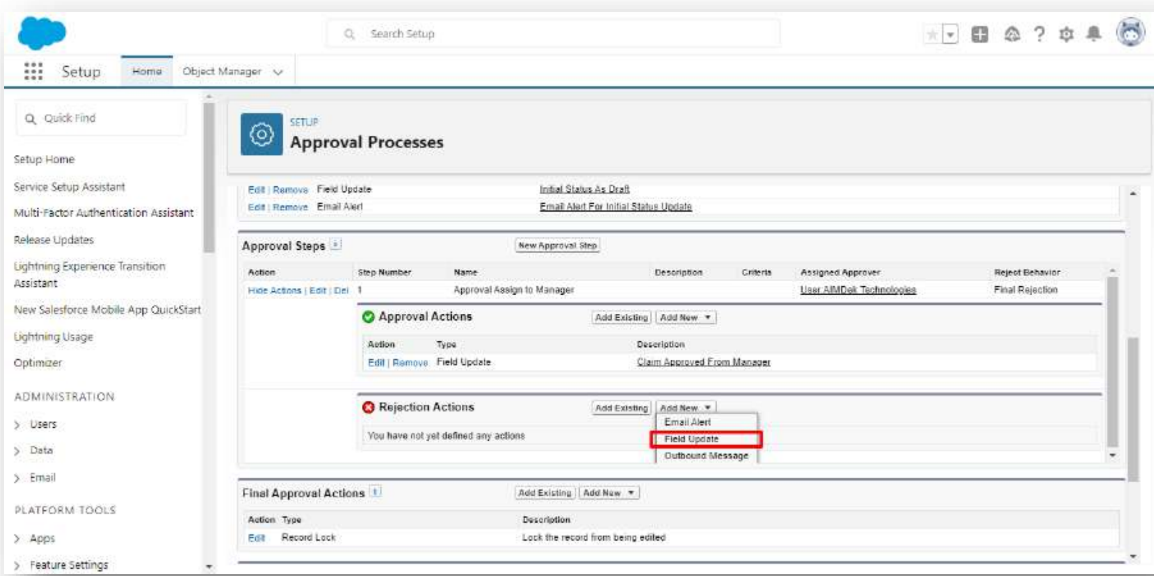




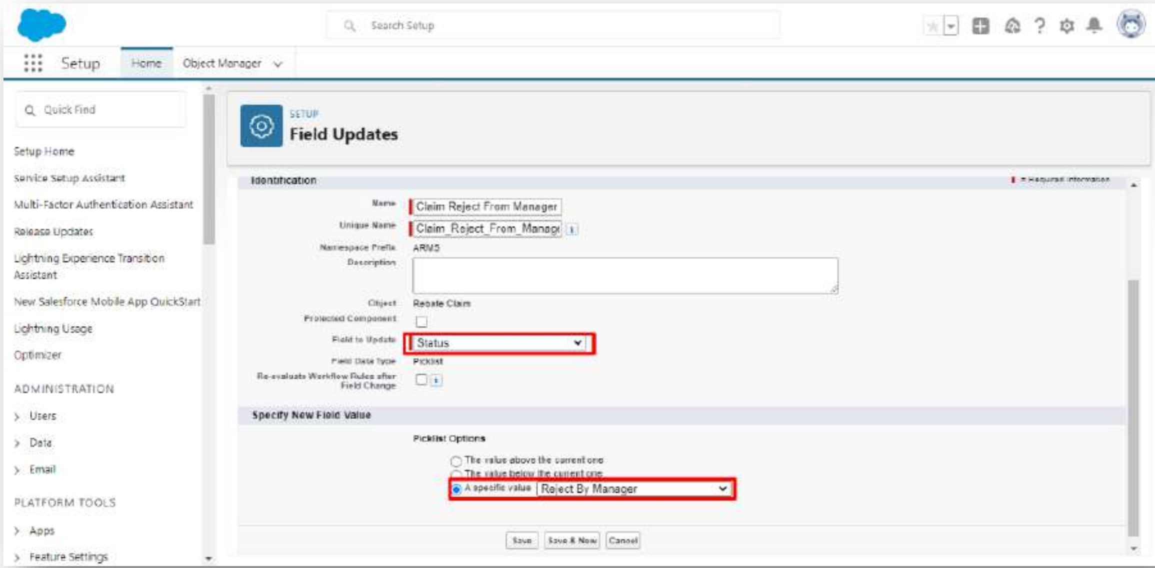
II. Enter "Name", "Unique Name" and Select "Status" in Field to Update. Select A specific value as "Approved by Manager"



III. From the Rejection Action select "Show Action" then Select "Add New" and Select "Field Update"



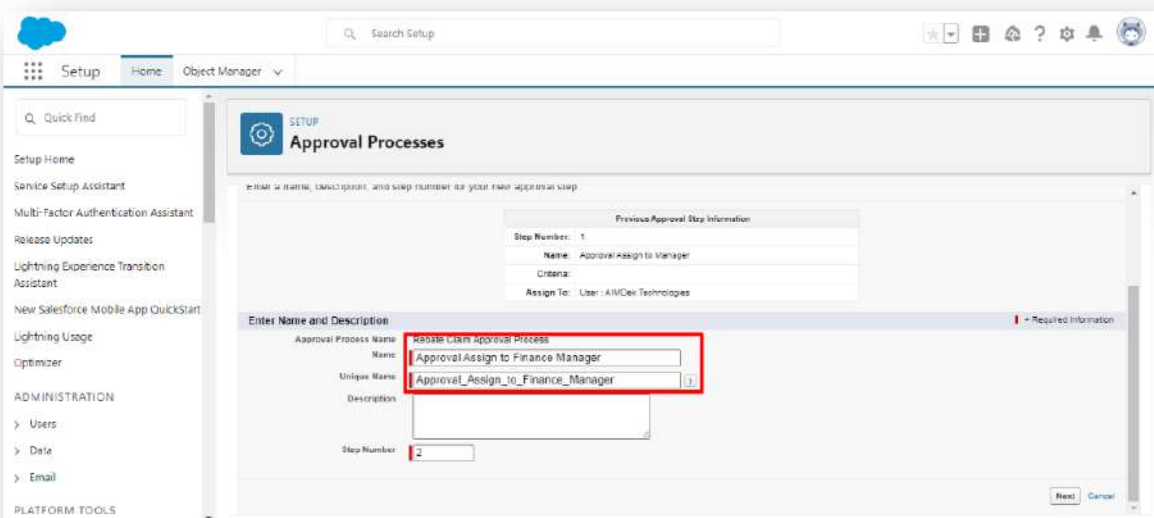
IV. Enter "Name", "Unique Name" and Select "Status" in Field to Update. Select A specific value as "Rejected by Manager"



Press “Save” button. Next step is “Approval Steps”.

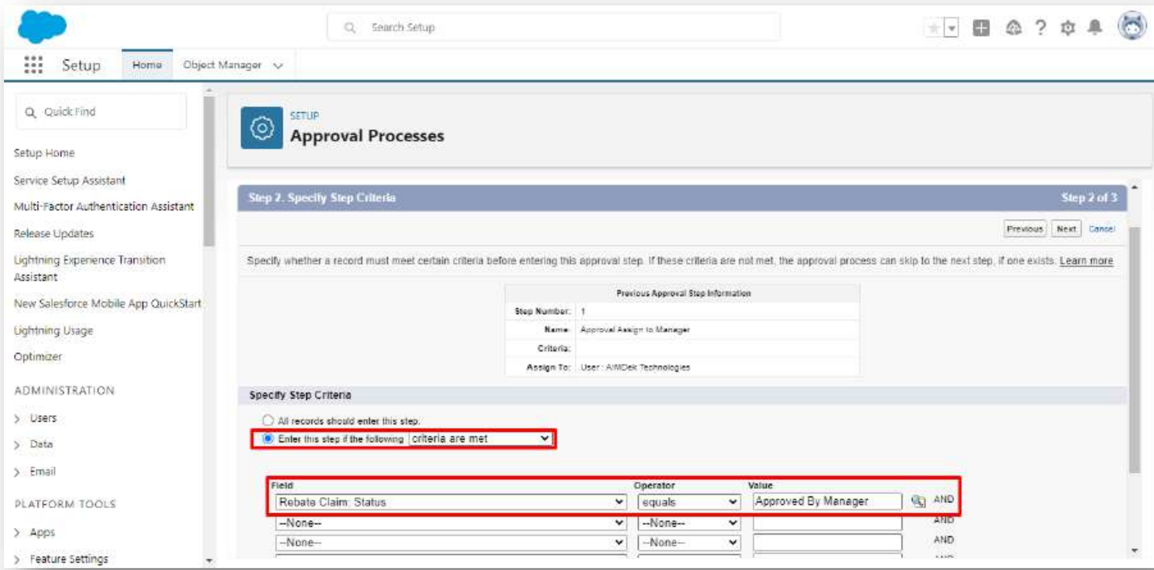
3.5.10 - From the Approval Steps --> Click on “New Approval Step”.

I. Enter “Name” and “Description and Press “Next button.



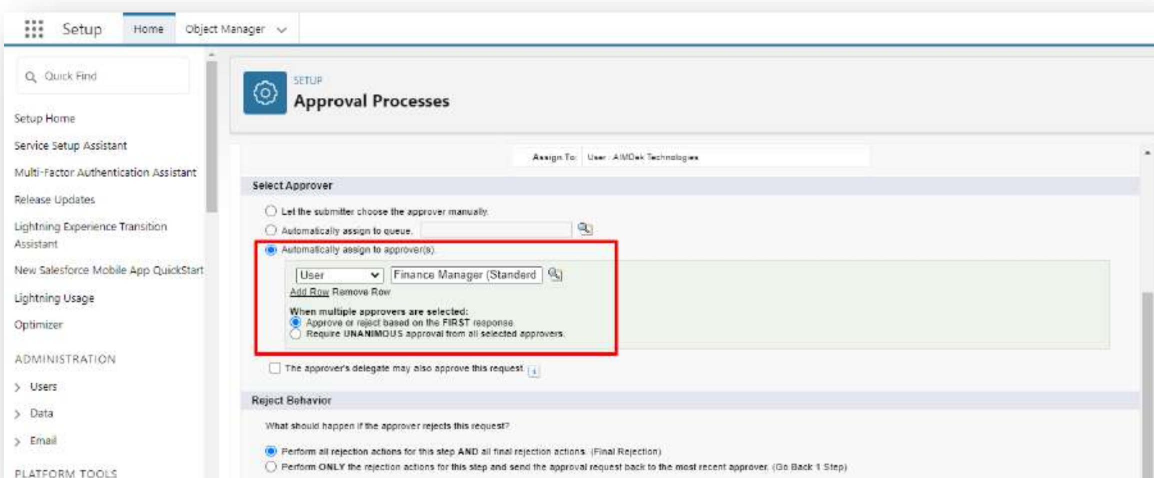
II. From the ''Specify Step Criteria'' --> select Enter this step if the following criteria are met from the dropdown.

Then select Fields, Operator and Value as shown in the below figure.



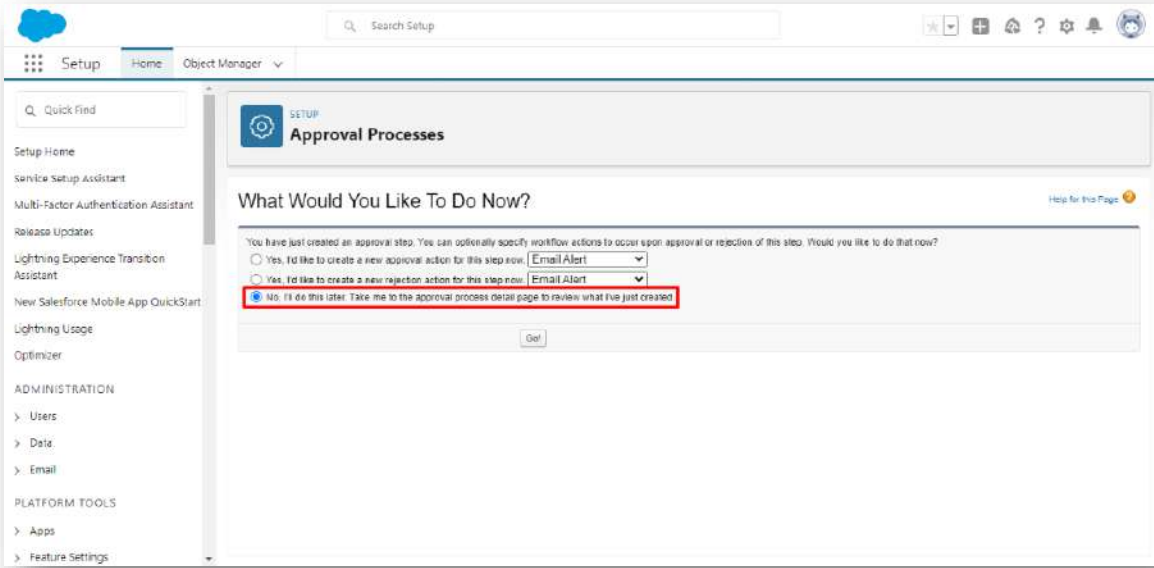
Press Next

III. From the Select Approver --> Select Automatically assign to approver(s). Then select User and add Finance Manager (Standard User) from the dropdown. And then select the below mentioned options from the figure.



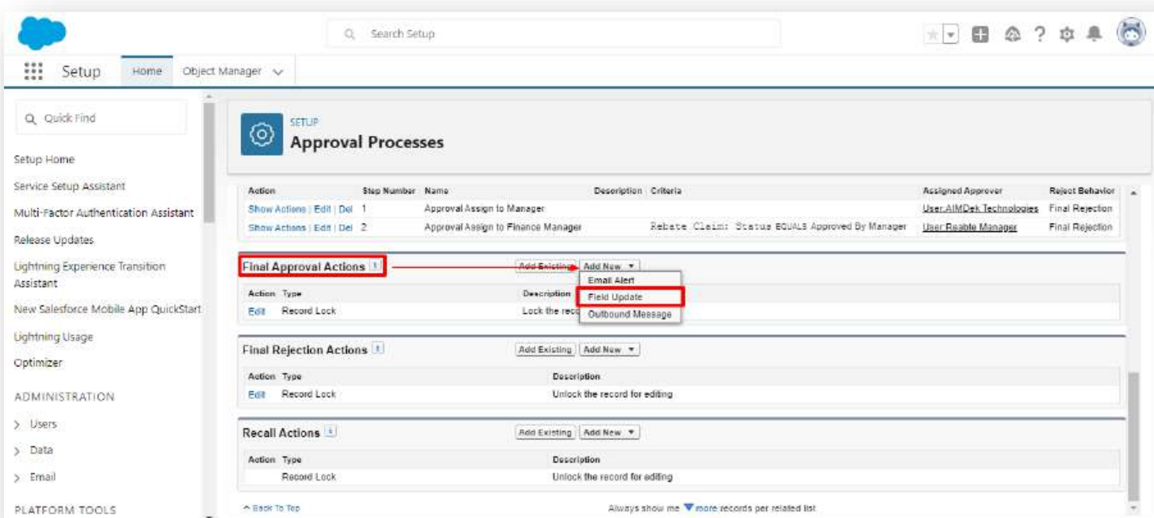
Press “Save”.

IV. Select option "No, I'll do this later. Take me to the approval process detail page to review what I've just created".

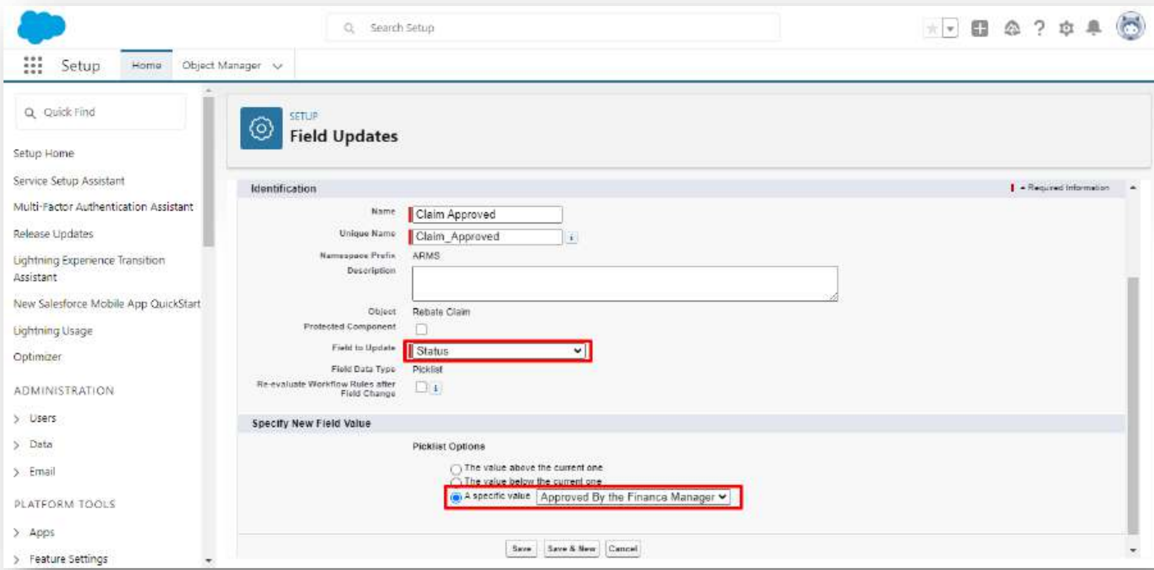


Click on “Go” button.

3.5.11 - From the Final Approval Actions -> From the Add New dropdown -> Select Field Update

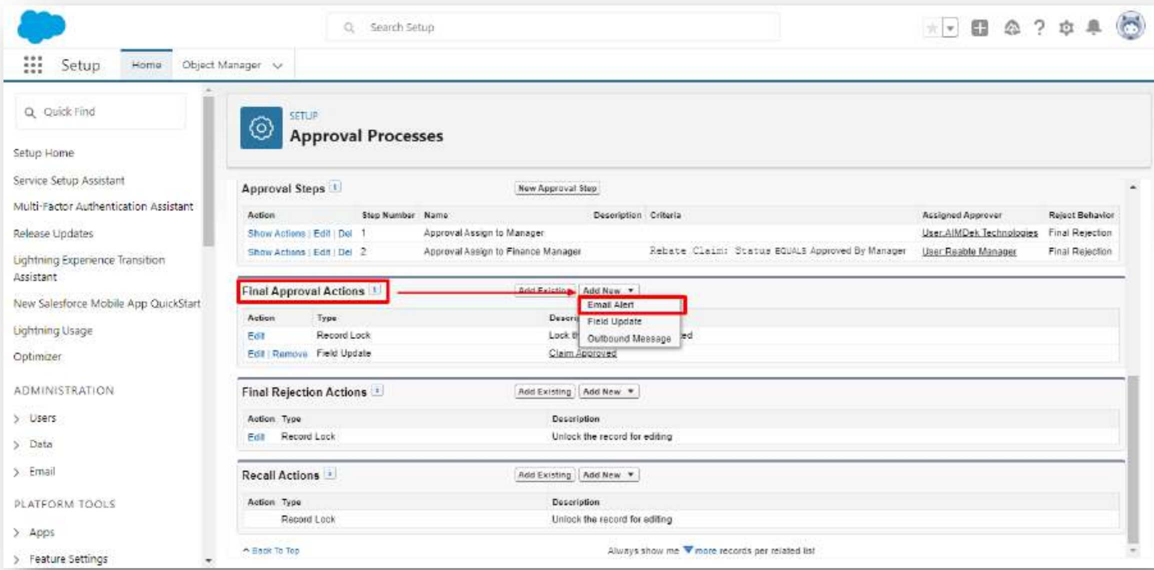


- Name -> Final Approval from Finance Manager
- Field to Update -> Status
- Specify New Field Value -> Approved by Finance Manager

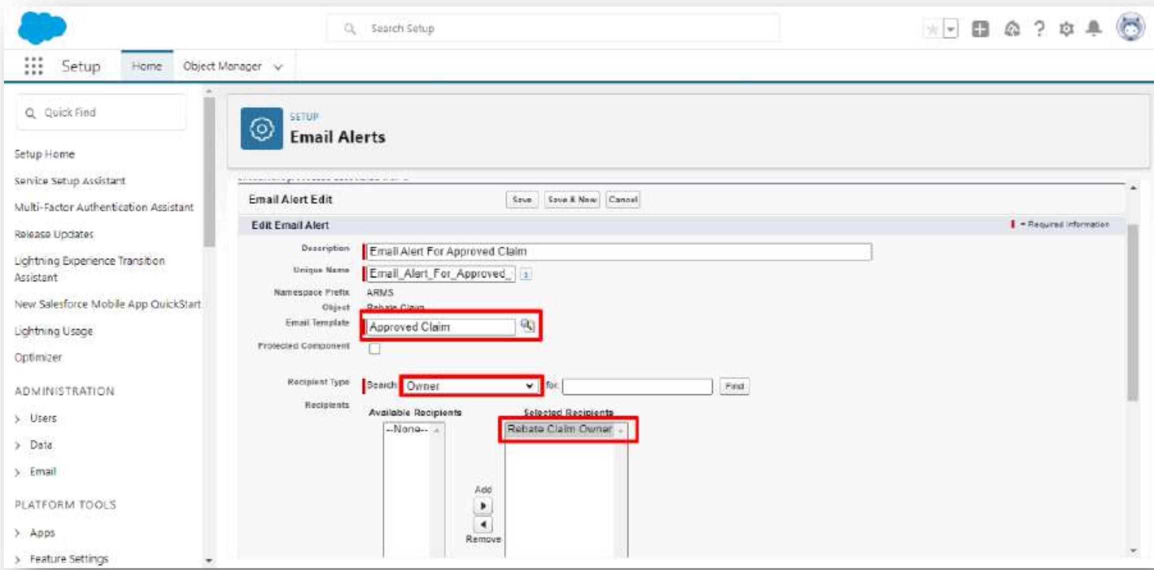


Press “Save” button.

3.5.12 From the Final Approval Actions -> From the Add New dropdown -> Select Email Alert

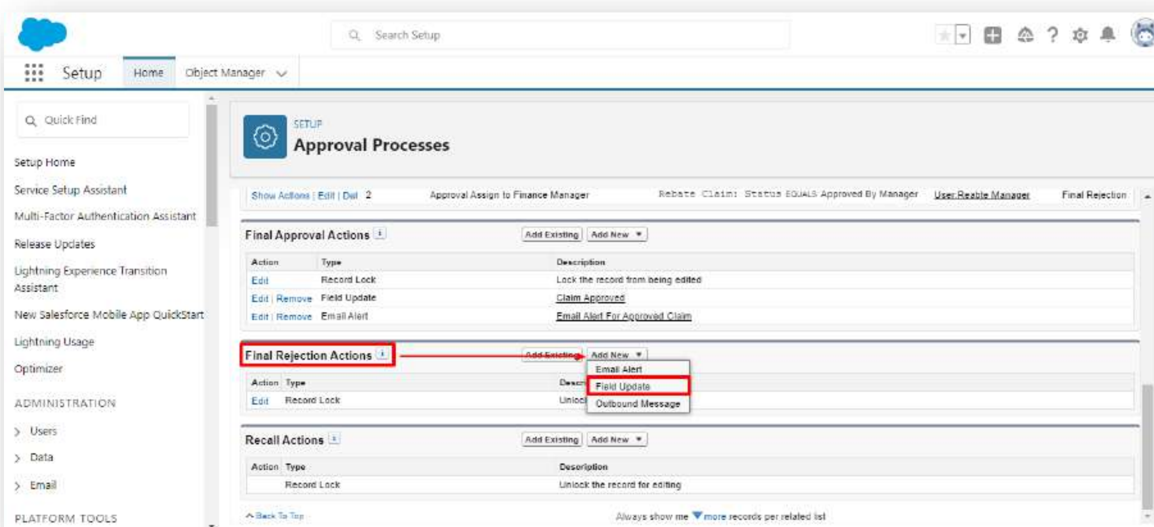

Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Apps
Feature Settings
SETUP
Approval Processes
Approval Steps
New Approval Step
Action
Step Number
Name
Description
Criteria
Assigned Approver
Reject Behavior
Show Actions | Edit | Del 1 Approval Assign to Manager User AIMDek Technologies Final Rejection
Show Actions | Edit | Del 2 Approval Assign to Finance Manager Rebate Claim: Status EQUALS Approved By Manager User Reable Manager Final Rejection
Final Approval Actions
Add Existing
Add New
Email Alert
Field Update
Outbound Message
Action
Type
Edit Record Lock
Edit | Remove Field Update Claim Approved
Final Rejection Actions
Add Existing
Add New
Action Type Description
Edit Record Lock Unlock the record for editing
Recall Actions
Add Existing
Add New
Action Type Description
Record Lock Unlock the record for editing
Back To Top
Always show me more records per related list

- Give Description, Unique Name
- Select Email Template
- Classic -> Rebate Management Template -> Approved Claim Templates
- Search: User -> Select and Add Finance Manager (Standard User)

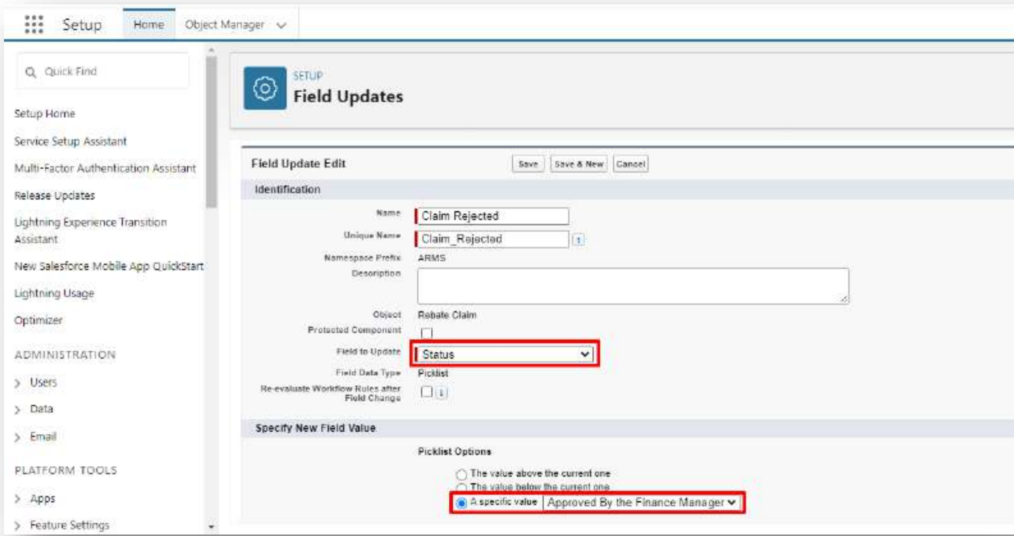


Press “Save”.

3.5.13 - From the Final Rejection Actions -> From the Add New dropdown -> Select Field Update

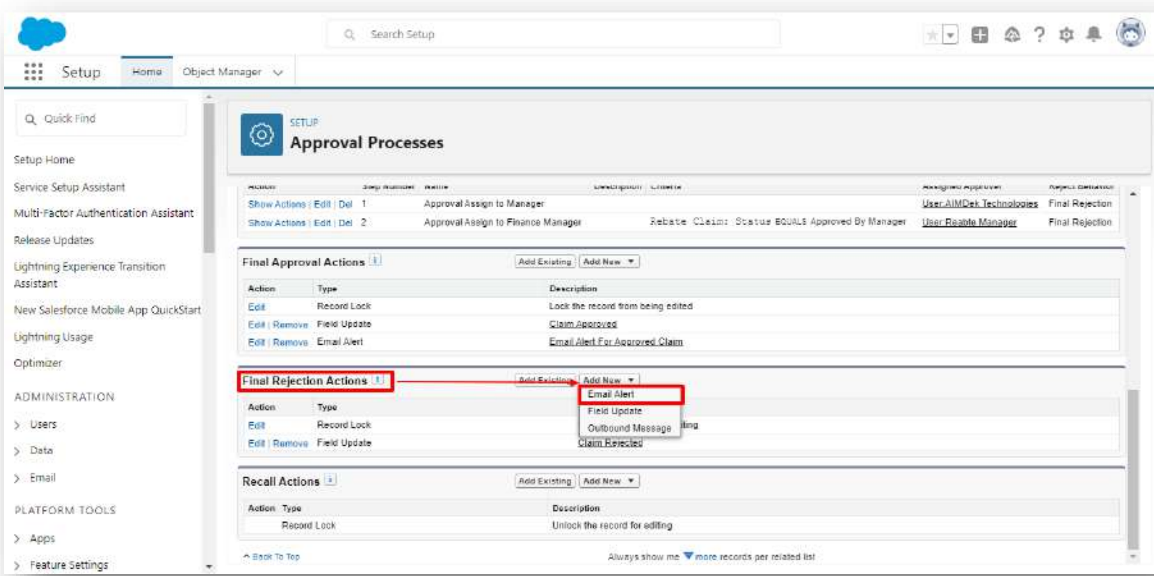


- Name -> Final Rejected from Finance Manager
- Field to Update -> Status
- Specify New Field Value -> Rejected by Finance Manager



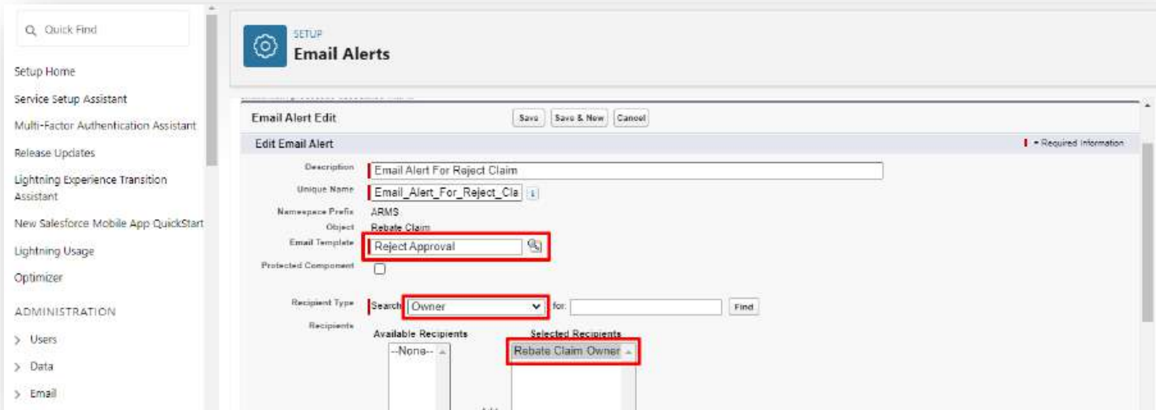
Press “Save” button.

I. From the Final Rejection Actions -> From the Add New dropdown -> Select Email Alert



- Give Description, Unique Name

- Select Email Template
- Classic -> Rebate Management Template -> Reject Approval Templates
- Search: User -> Select and Add Finance Manager (Standard User)



Press “Save” button

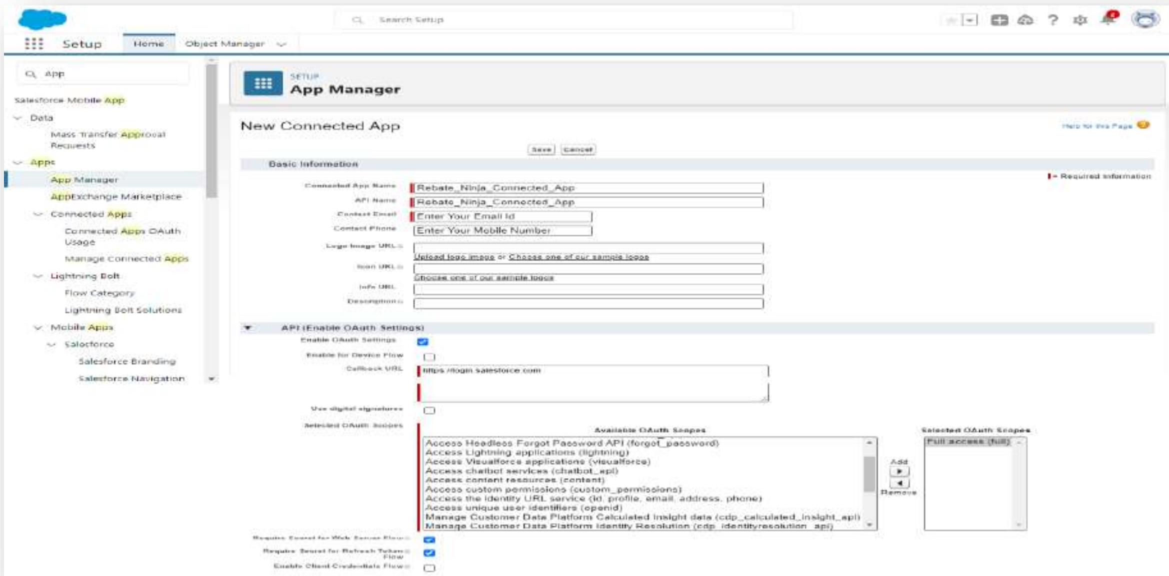
3.6. Steps for creating connected App and Name Cred.

1. Go to setup

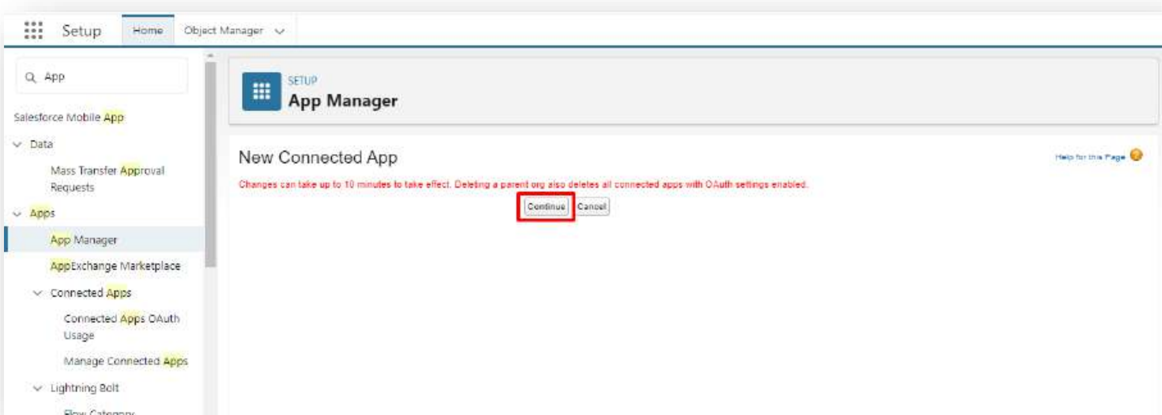
2. Search 'App Manager' in Quick Find and select it.

3. Click on 'New Connected App' button on Top right of the page.

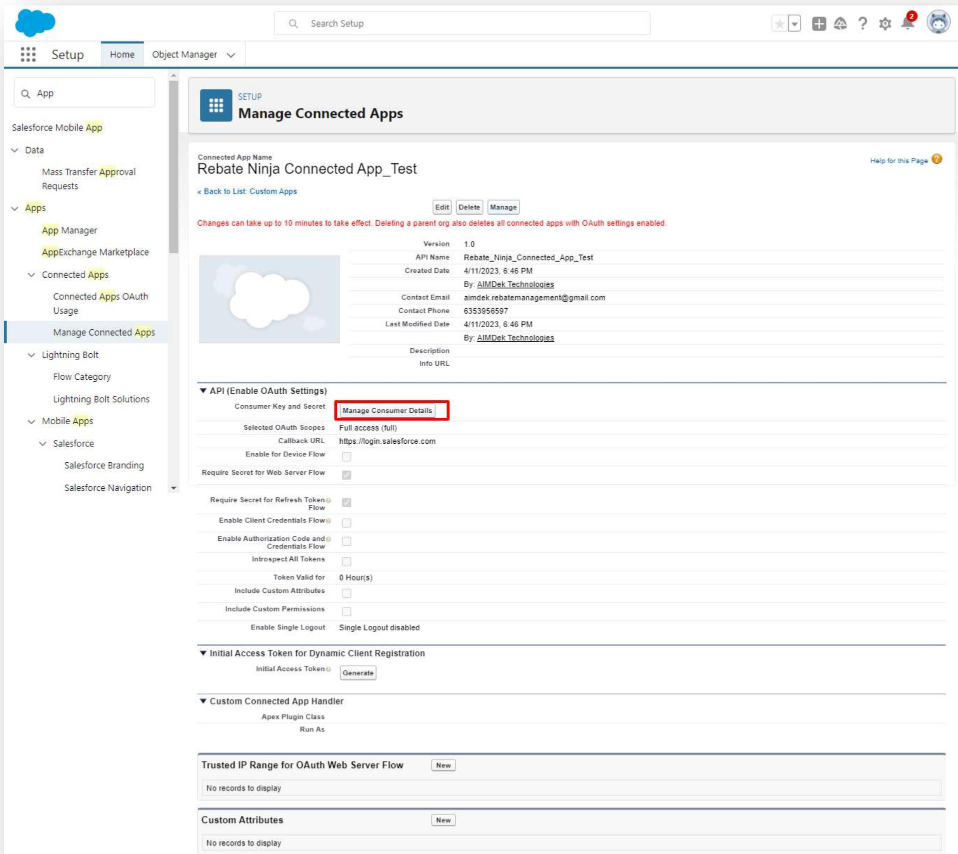
4. Fill all the fields same as the image below.



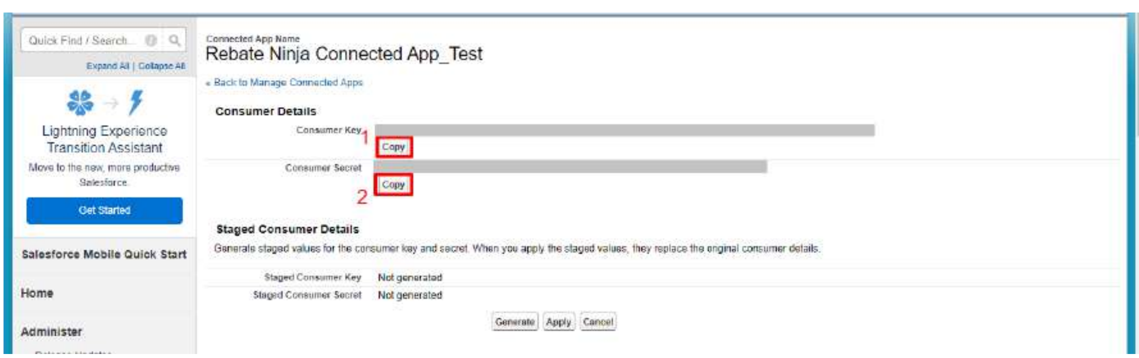
5. Click on the “Save” button.



6. Click on the “Continue” button.



7. Click on the "Manage Consumer Details" button.

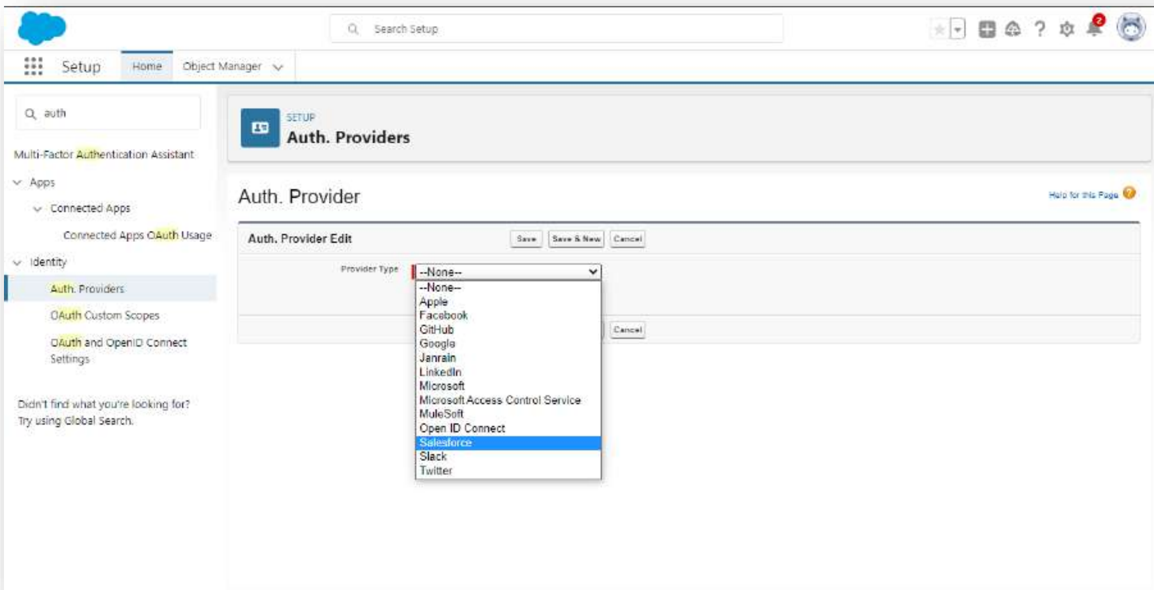


8. copy the ''Consumer Key'' and ''Consumer Secret''

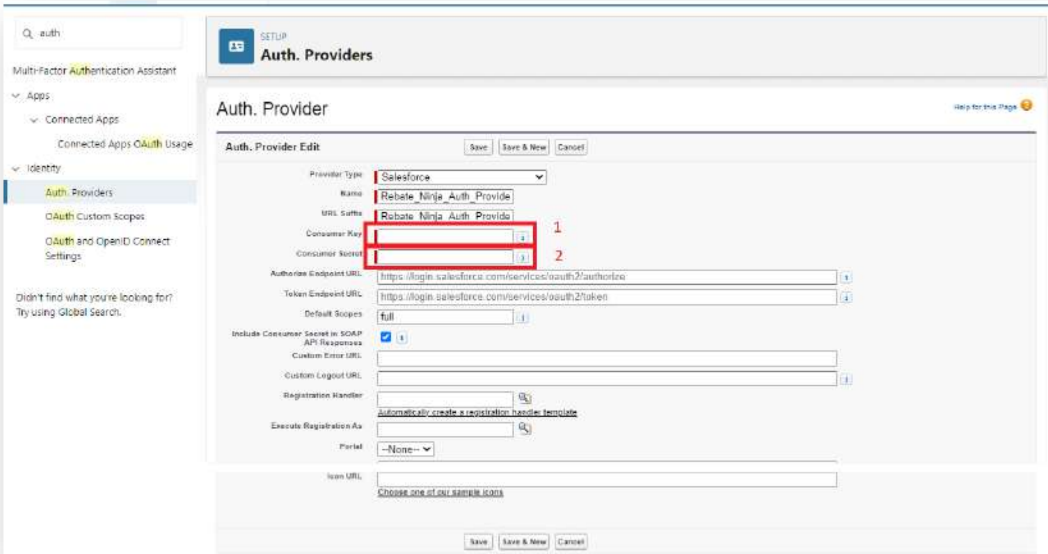
9. Go to setup

10. Search 'Auth providers' in Quick Find and select it.

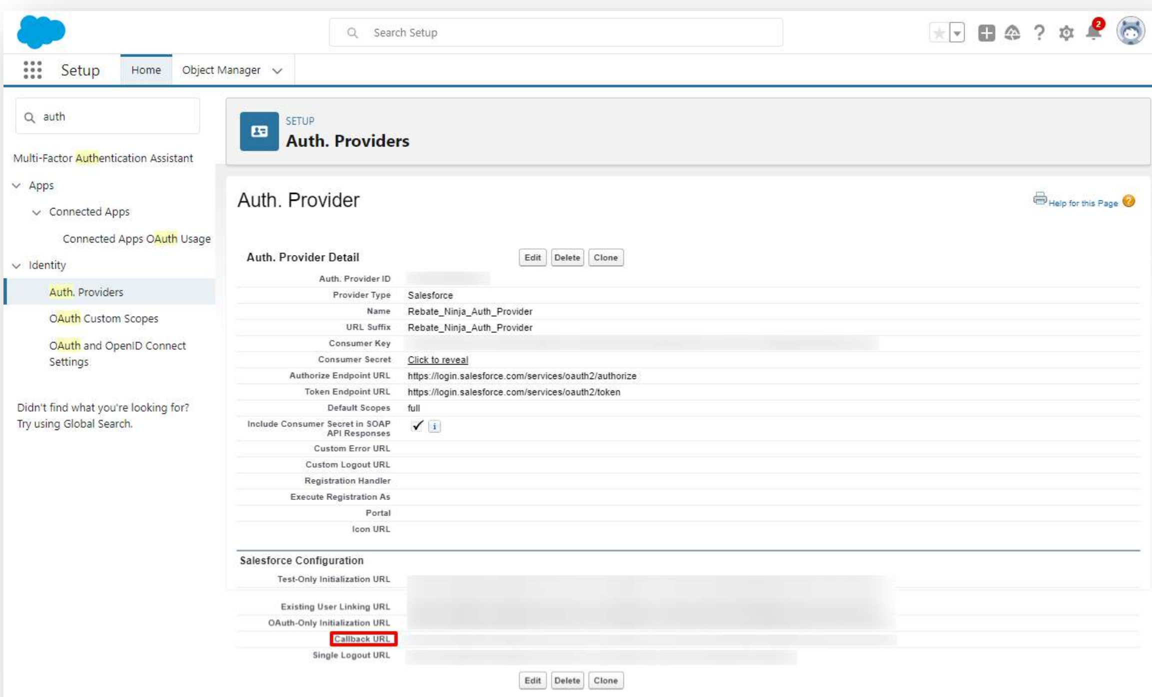
11. Select ‘Salesforce’ from the Provider Type.



12. Fill all the fields same as the image below.



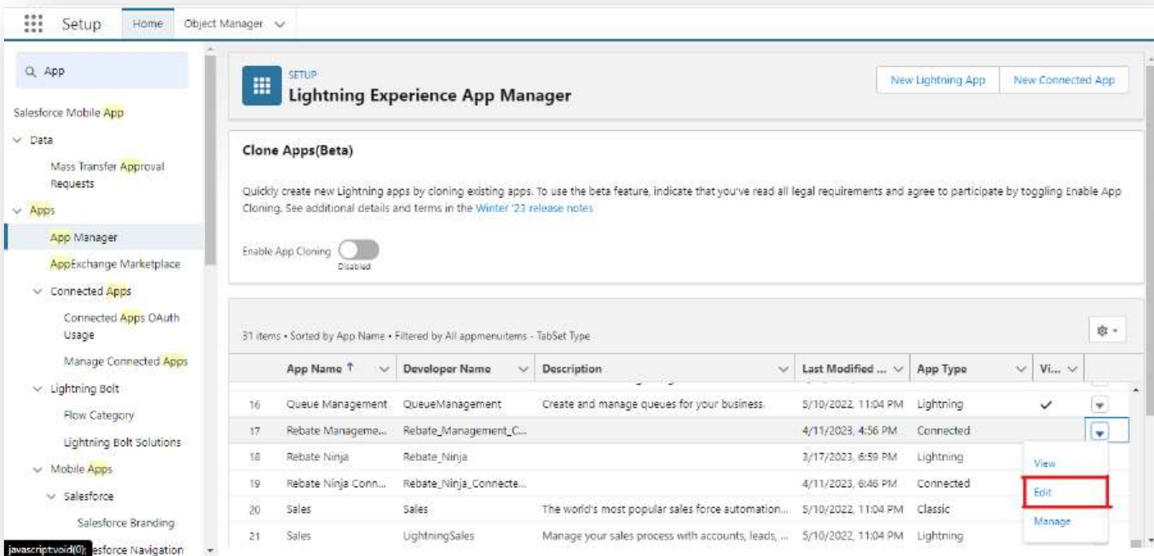
13. Paste the ''Consumer Key'' and ''Consumer Secret'' which were copied from the [Step-8] and Press "Save".

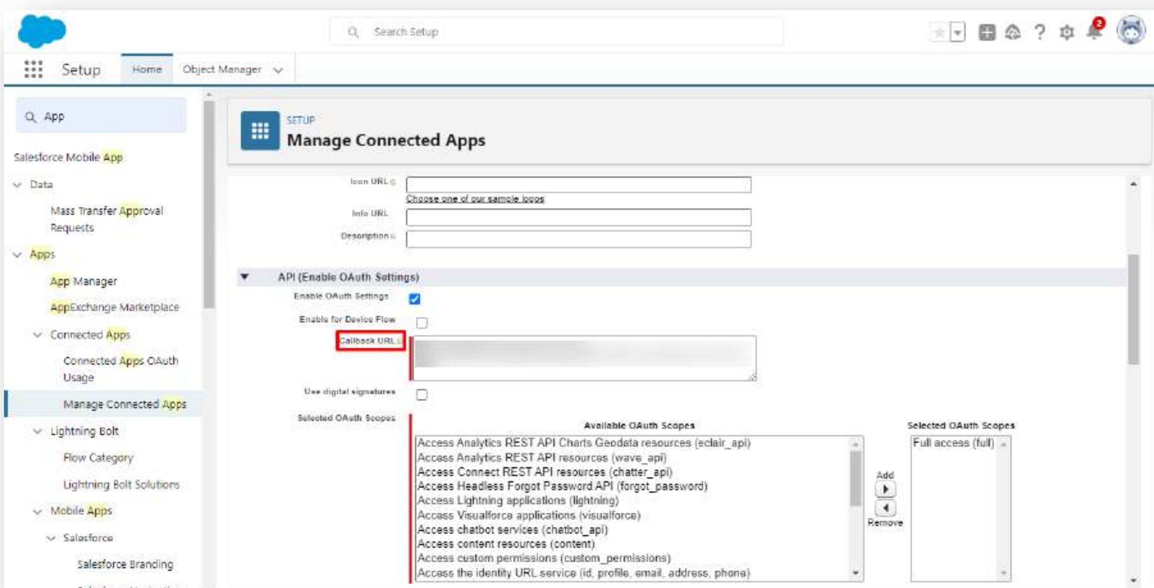


14. Select the Auth. Providers that user created, and Copy the Callback URL as mentioned above.

15. Go to setup and Search 'App Manager' in Quick Find and select it.

16. Select Connected App that you created earlier and click ‘Edit’.

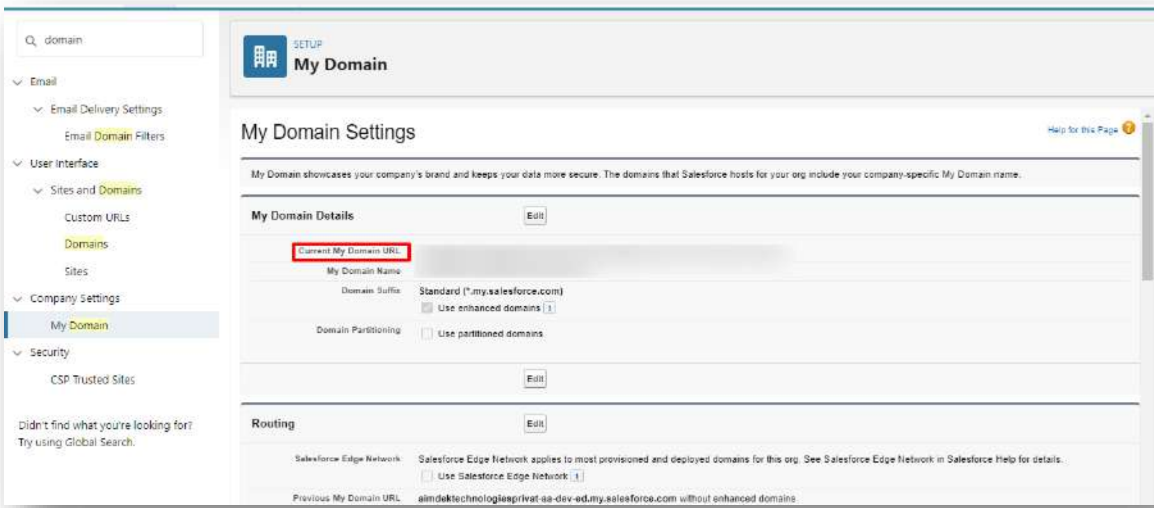




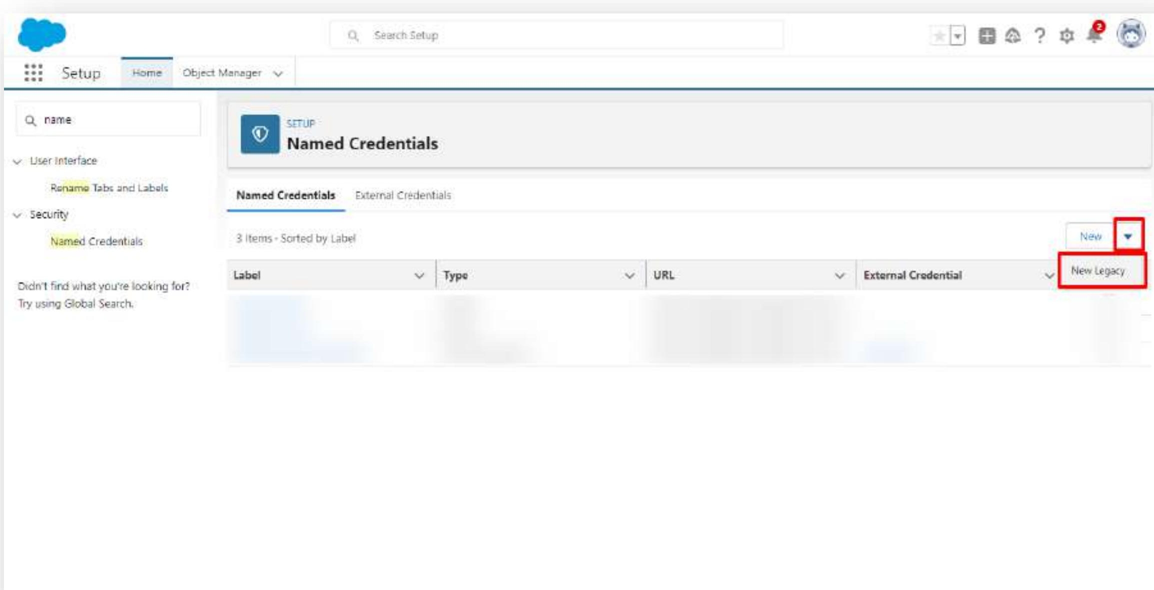
17. Paste the URL which was copied in [Step –14] and Press ‘Save’.

18 Go to setup and Search ‘My domain’ in Quick Find and select it.

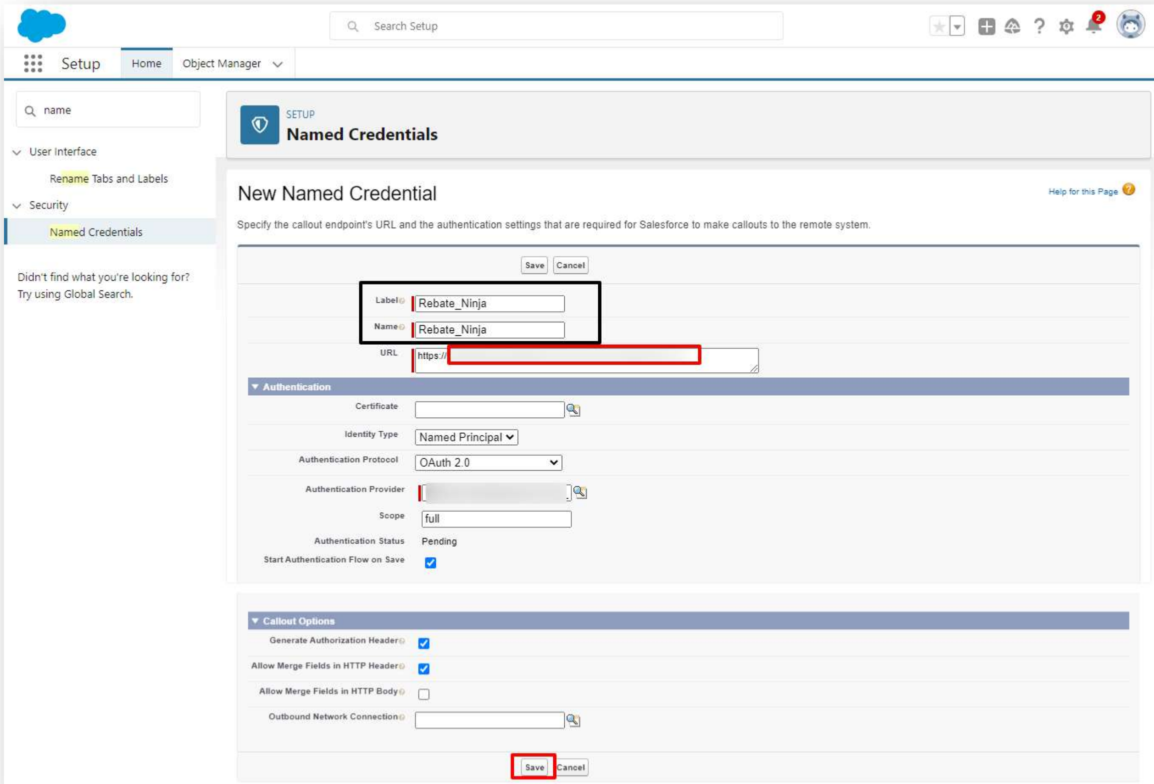
19. Copy ‘Current My domain URL’.



20. Go to Setup and Search ‘Named Credentials’ in Quick Find and select it.



21. Go to ‘New Legacy’ as shown above.

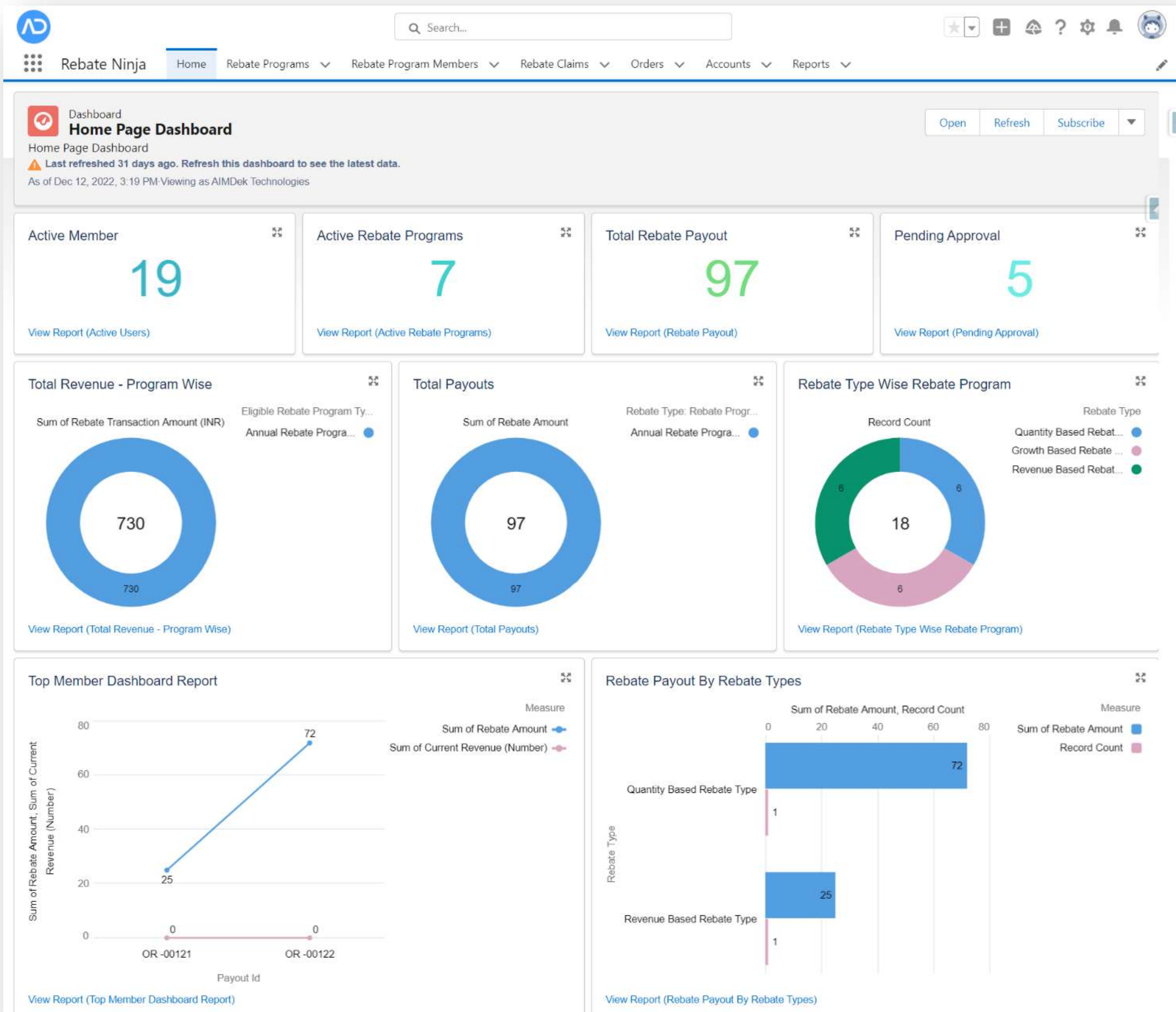


22. Set the Label and Name values as ‘**Rebate_Ninja**’, Paste the URL which was copied in [Step-19] with prefix ‘https://’ and. press ‘Save’.

4.Web application

Rebate Ninja can be accessed by using a web browser. The user just needs to log into its Salesforce organization and look for the Rebate Ninja application in the Force.com menu.

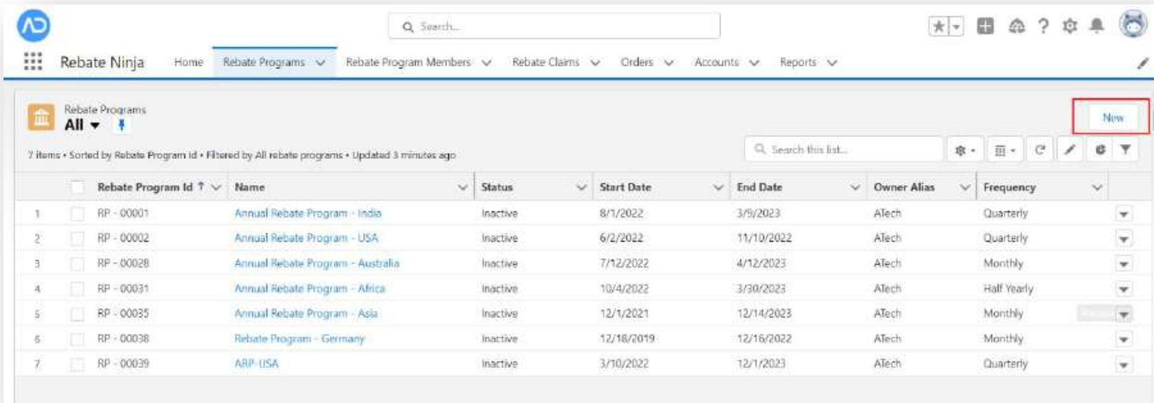
4.1 Home Screen



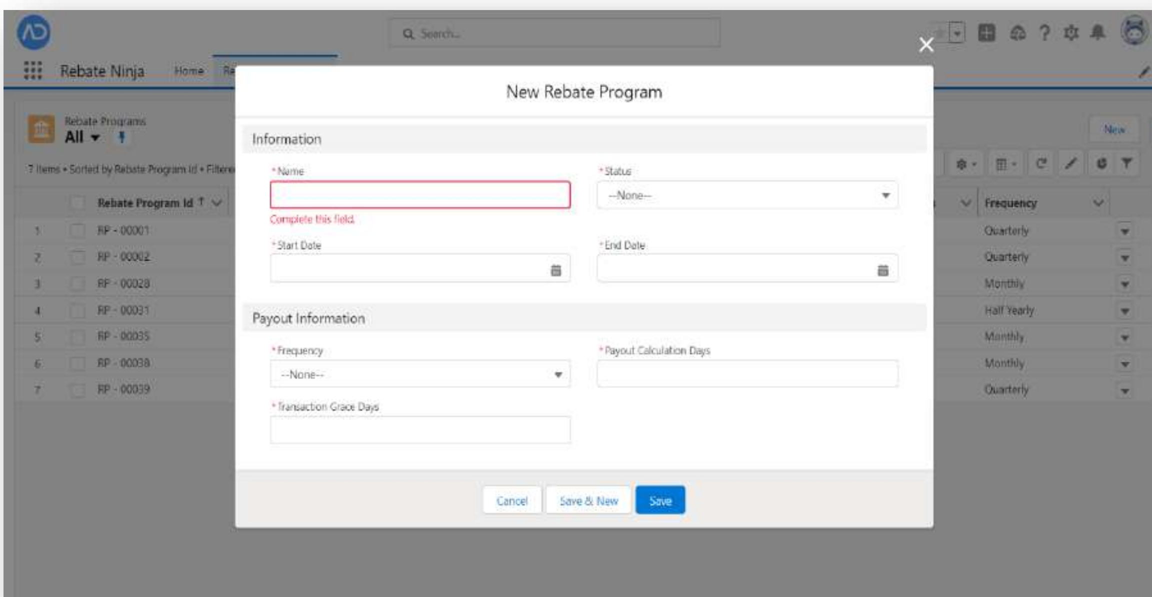
This dashboard includes several essential pieces of information for the entire system. This shows the following sections on this tab filtered for the user that is logged in Active Members, Active Rebate Programs, Total Rebate Payouts, pending approval, Total revenue, Total payouts, rebate type wise rebate program and more customized options users can select as per their choice.

4.2 Rebate Programs

When “Rebate Programs” tab is selected, default screen will appear listing all the rebate programs that the user has created.



4.2.1 Create New Rebate Program



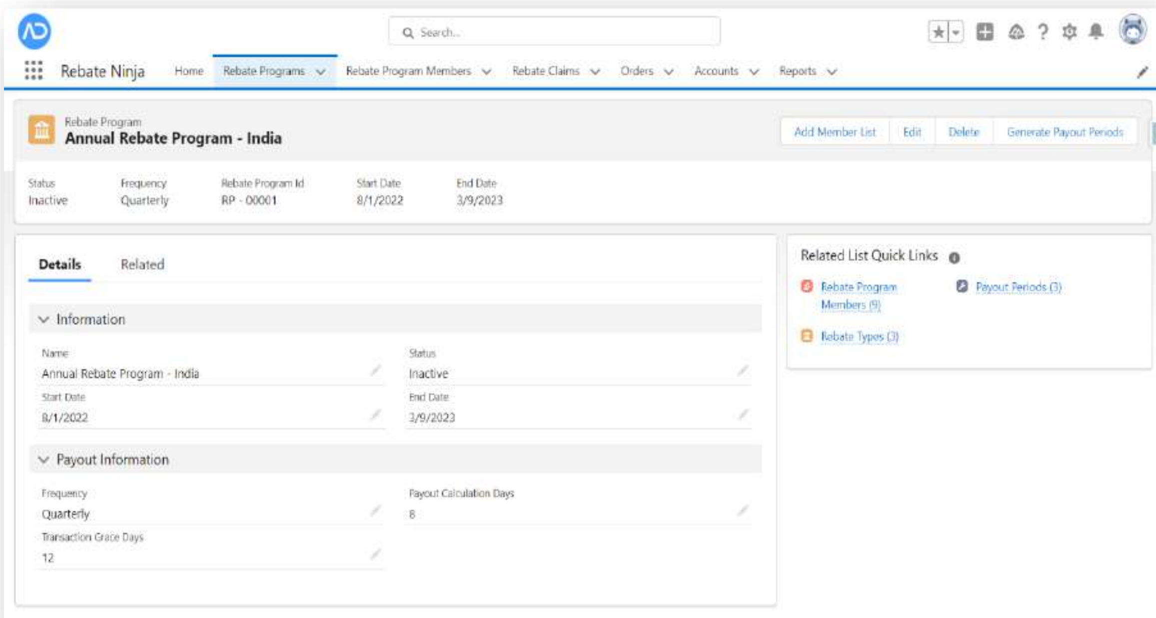
There is an option at the top right for creating a “New” rebate program. The new rebate program creation page will ask for the details below:

- Information.
- Payout Information.

In the “Payout Information” section, there is an option to select “Payout Calculation Days” and “Transaction Grace Days”.

Here the frequency of the payouts and grace period and when it will be calculated will be displayed
- Frequency: Monthly/ Quarterly/Half Yearly/Yearly
- Payout Calculation Days: 10 (When will the payout be calculated after the transaction grace period is ended)
- Transaction Grace Period: 5 (The number of days after the program end date the transactions can be submitted)

4.2.2 Rebate Program Details



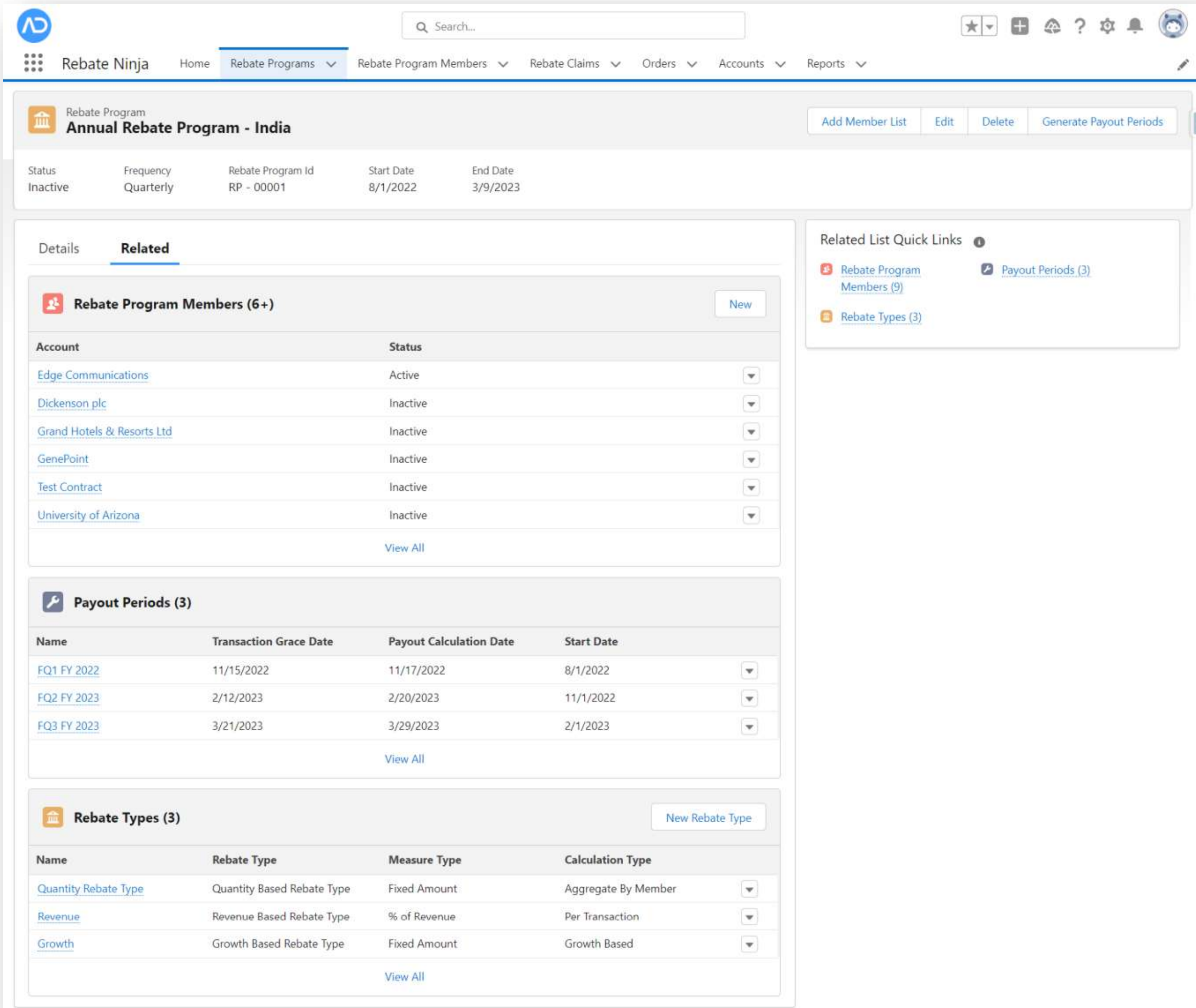
Upon clicking on a particular rebate program from the listing page, this page will be displayed along with all the detailed information about the selected rebate program. The Details tab consists of some more sub-sections as below:

- Details
- Related

Details Tab:

Here the status of the rebate program can also be viewed as either “draft", "Active” or “Inactive”.

Related Tab:



The Related tab lists all the rebate program members, Payout Periods and Rebate Types. The user can also see it from the related quick links as shown above.

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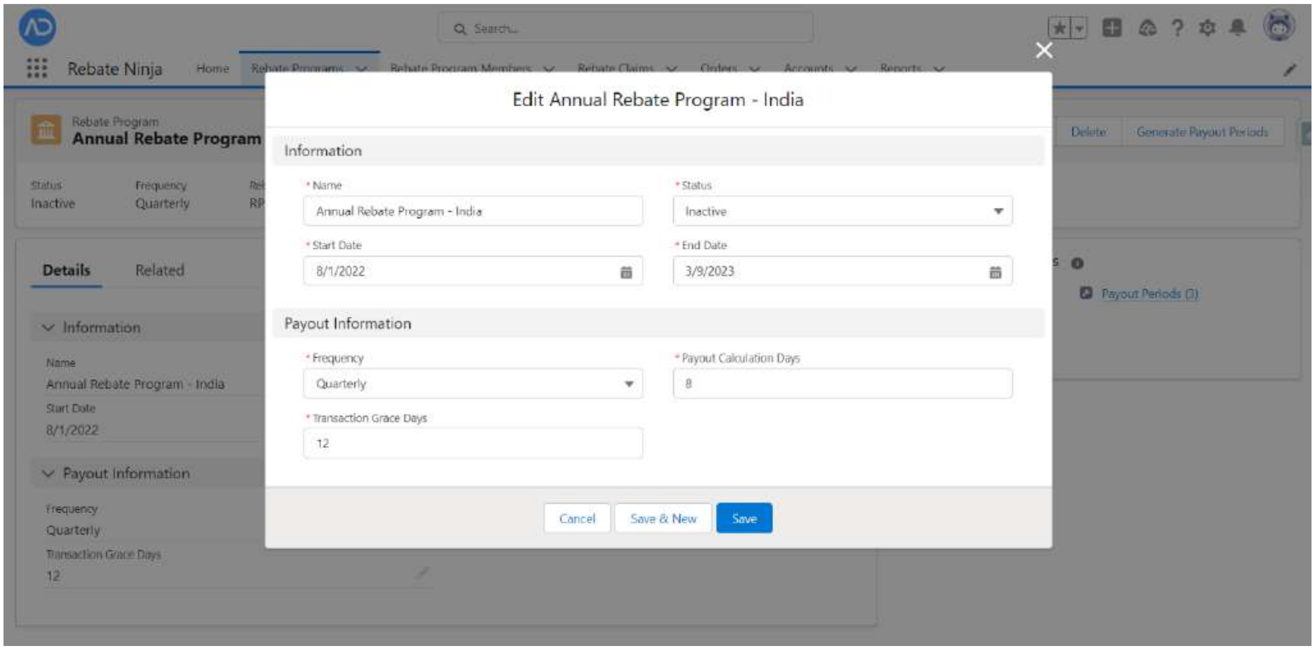
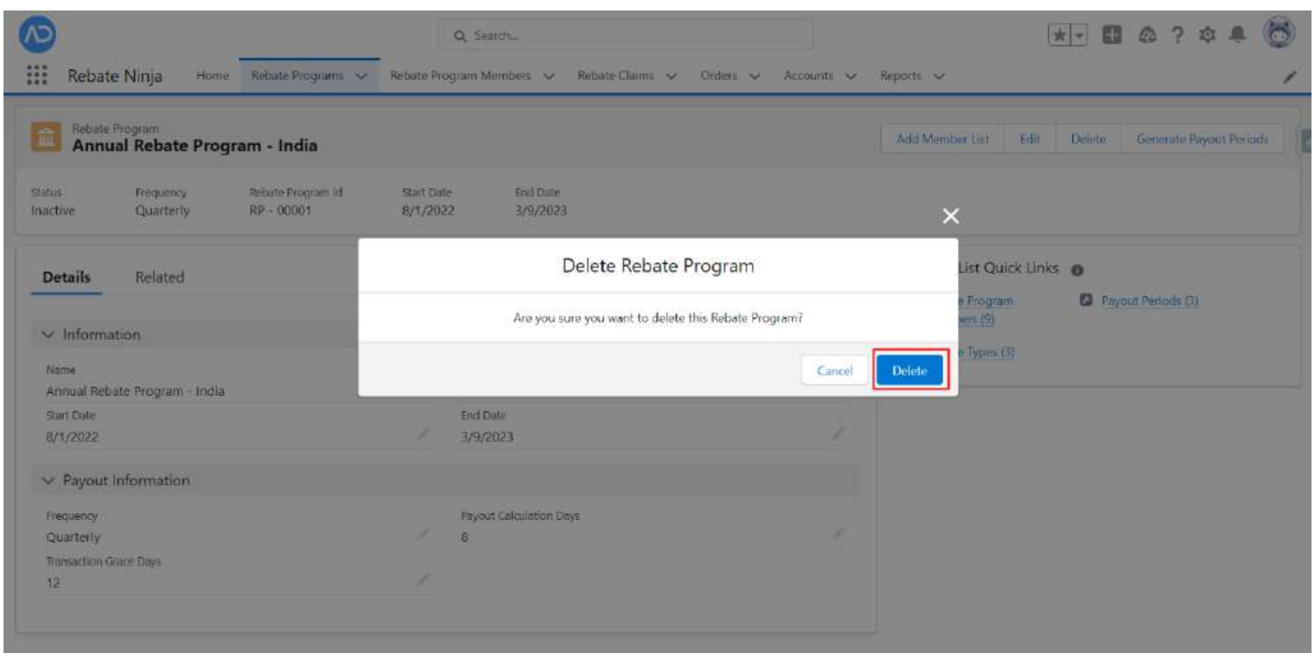
4.2.3 Edit Rebate Program:

All the information entered while creating a rebate program can be edited using this popup as shown below.



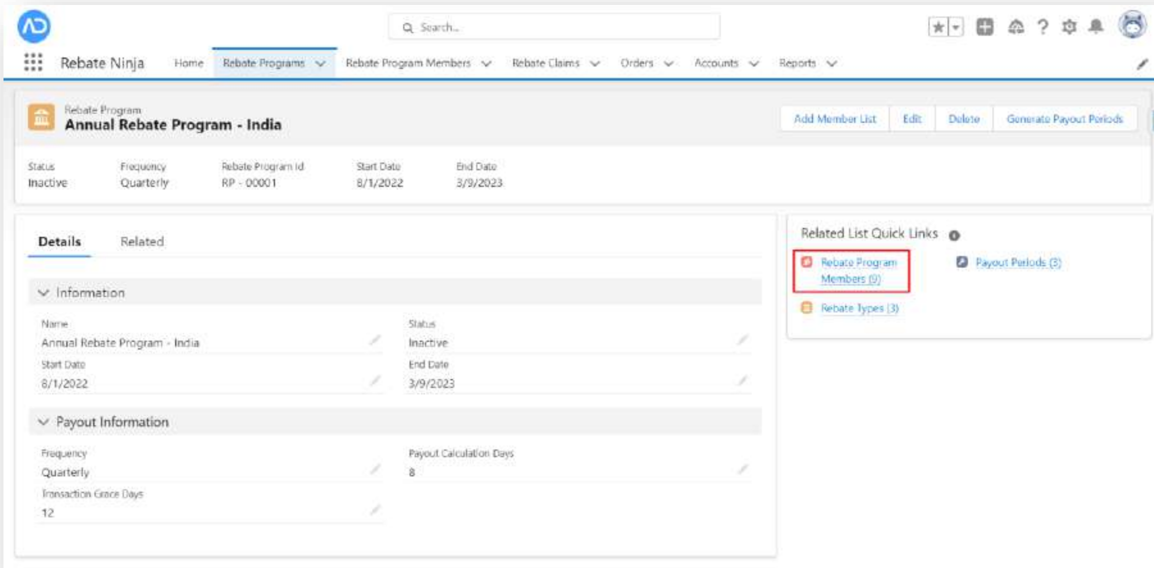
4.2.4 Delete Rebate Program:

There is an option to “Delete” rebate program. It can be deleted using the top right menu in the rebate program section.

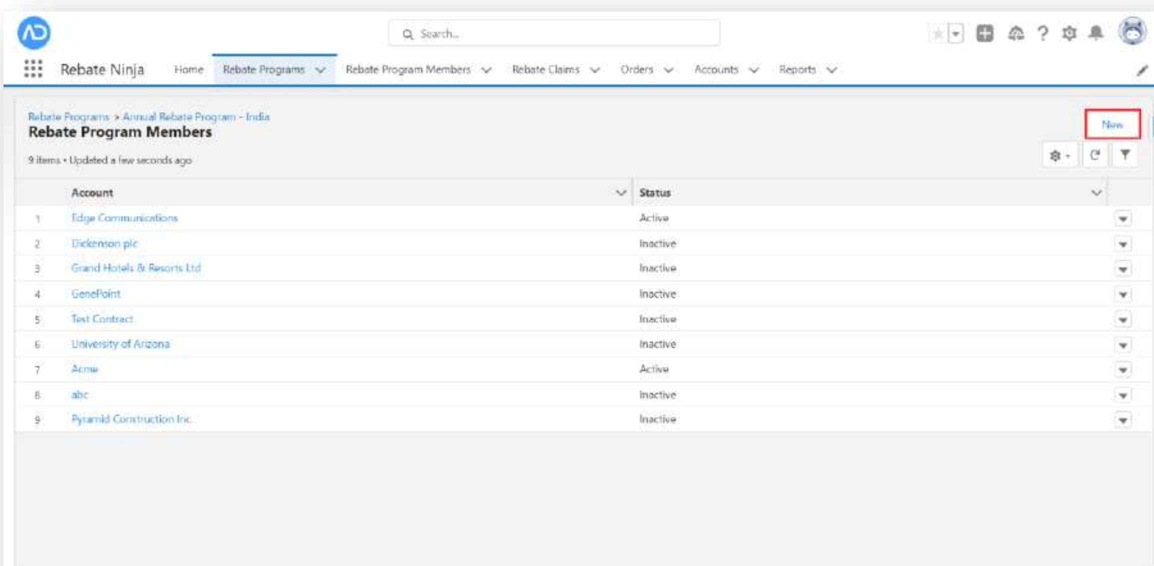


4.3 Rebate Program Members:

This will list all the members created for the rebate program.

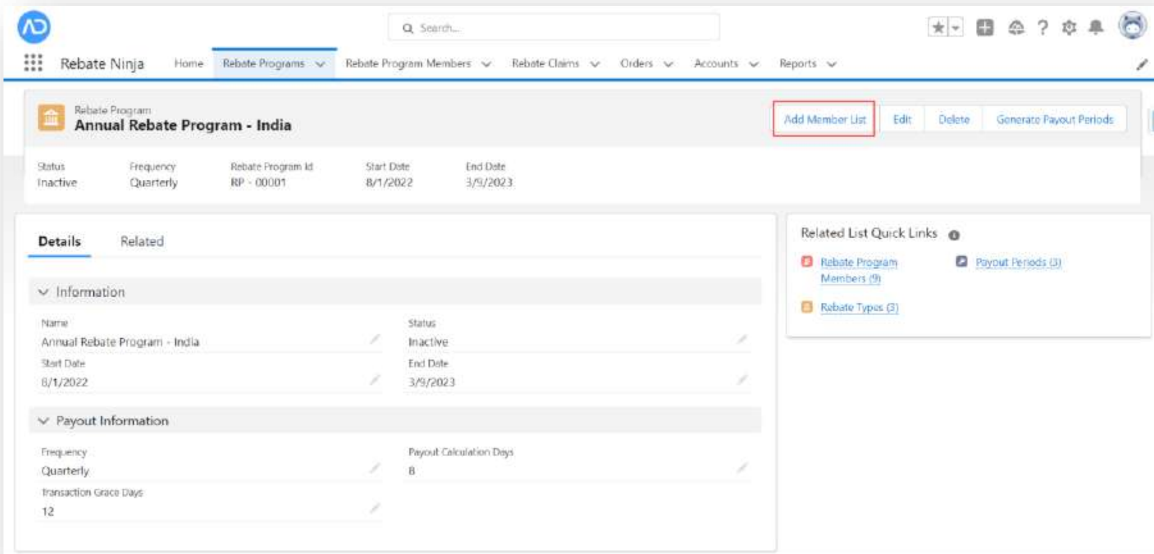


From the related quick links, the user will find the link of Rebate Program Members. Once the user clicks on this link it will display Rebate Program Members Page.

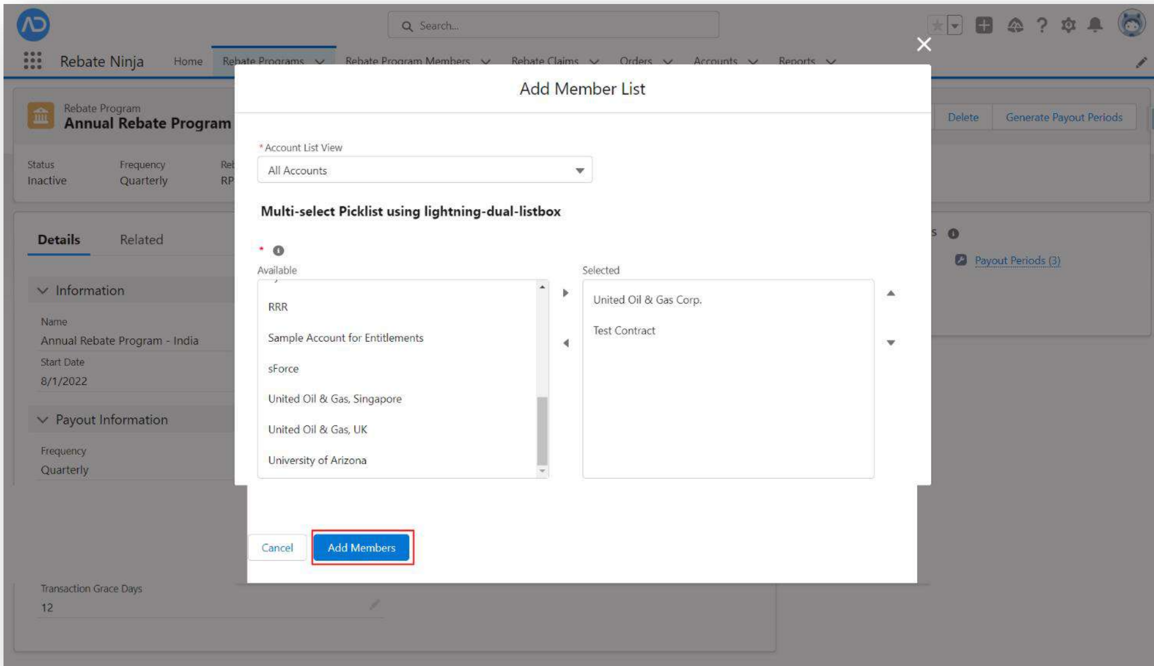


This page will display all the Rebate Program Members that are part of this Particular Rebate Program. From the “New” button the user can add members to the Rebate Program one by one.

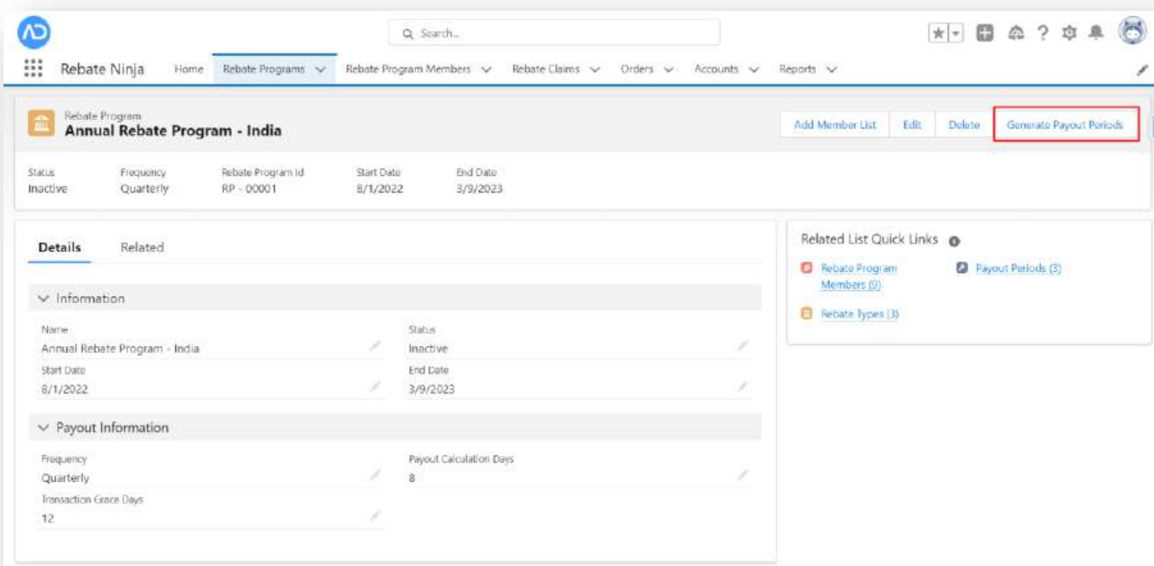
4.3.1 Add multiple Members from Rebate Program:



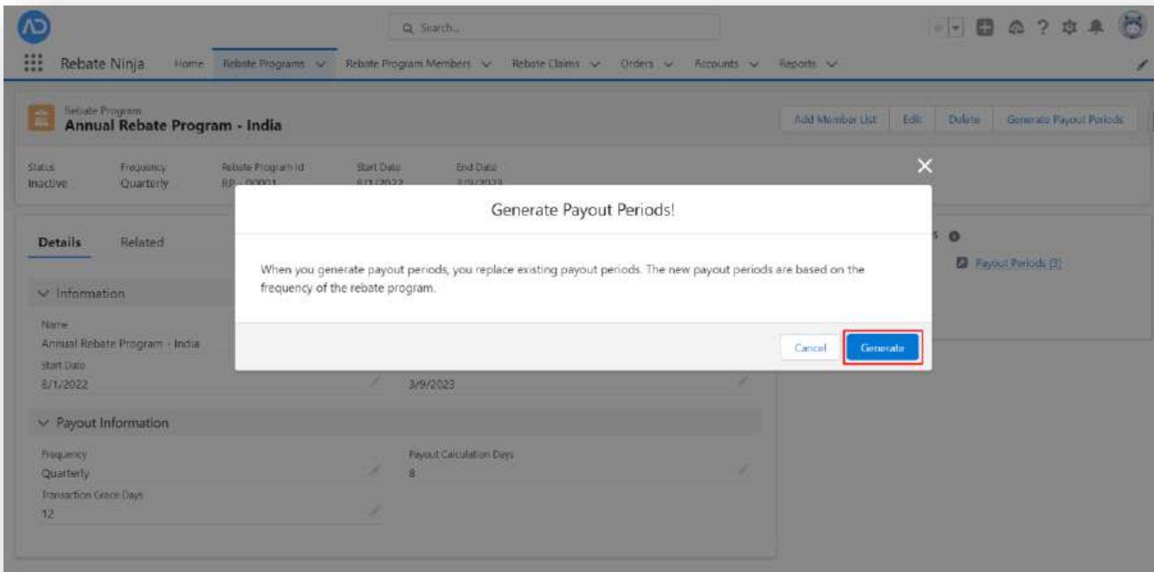
Once the user clicks on “Add Member List” button it will open a popup where the user needs to select the Account List View dropdown and then add multiple members to the Rebate Program.



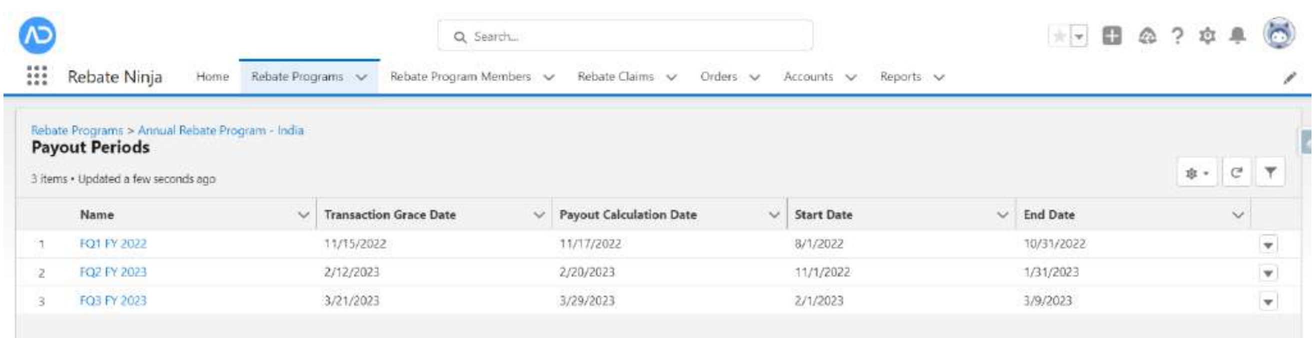
4.4 Generate Payout Periods for the Rebate Program:



When the user clicks on the “Generate Payout Periods” button the following popup will appear.



When the user clicks on the “Generate” button, Payout Periods will be generated for that Rebate Program.



This will be used to generate payout periods based on the start date, end date and frequency of the rebate program.

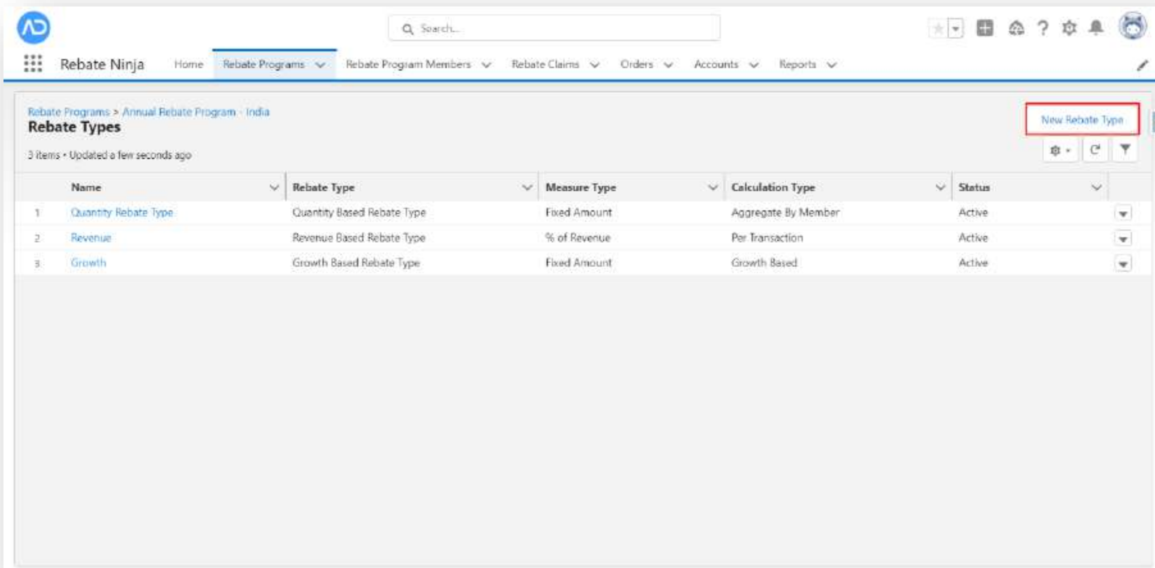
4.5 Rebate Types for the Rebate Program:

There will be three Rebate Types for the Particular Rebate Program:

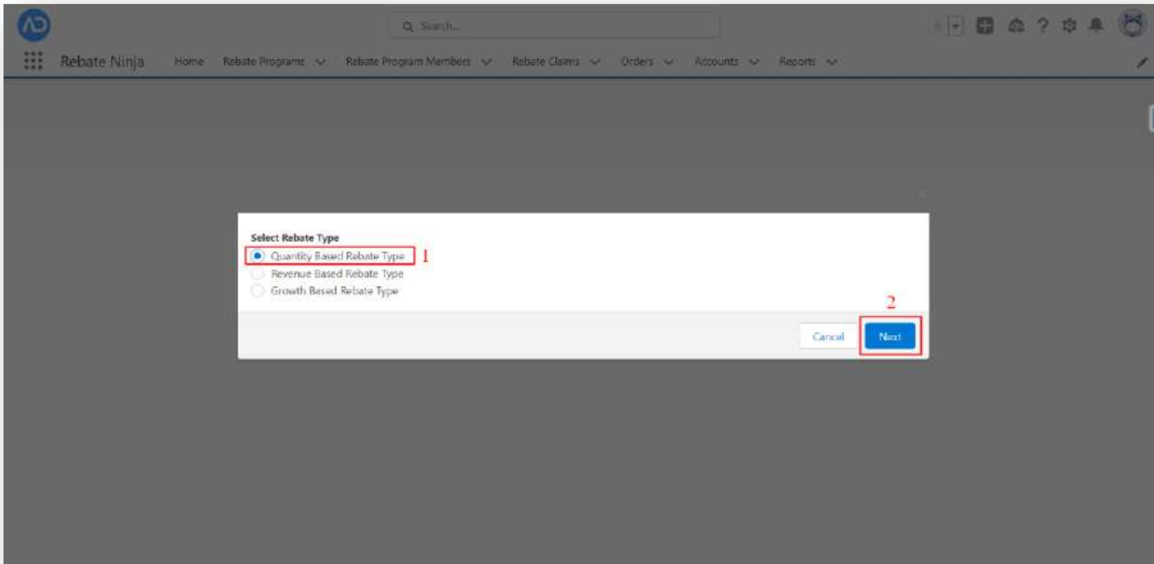
1. Quantity Based Rebate Type: This will be based on the number of quantities of goods ordered by the program members.
2. Revenue Based Rebate Type: This will be based on the Total Revenue for these program members.

3. Growth Based Rebate Type: This will be based on the Growth of these program members.

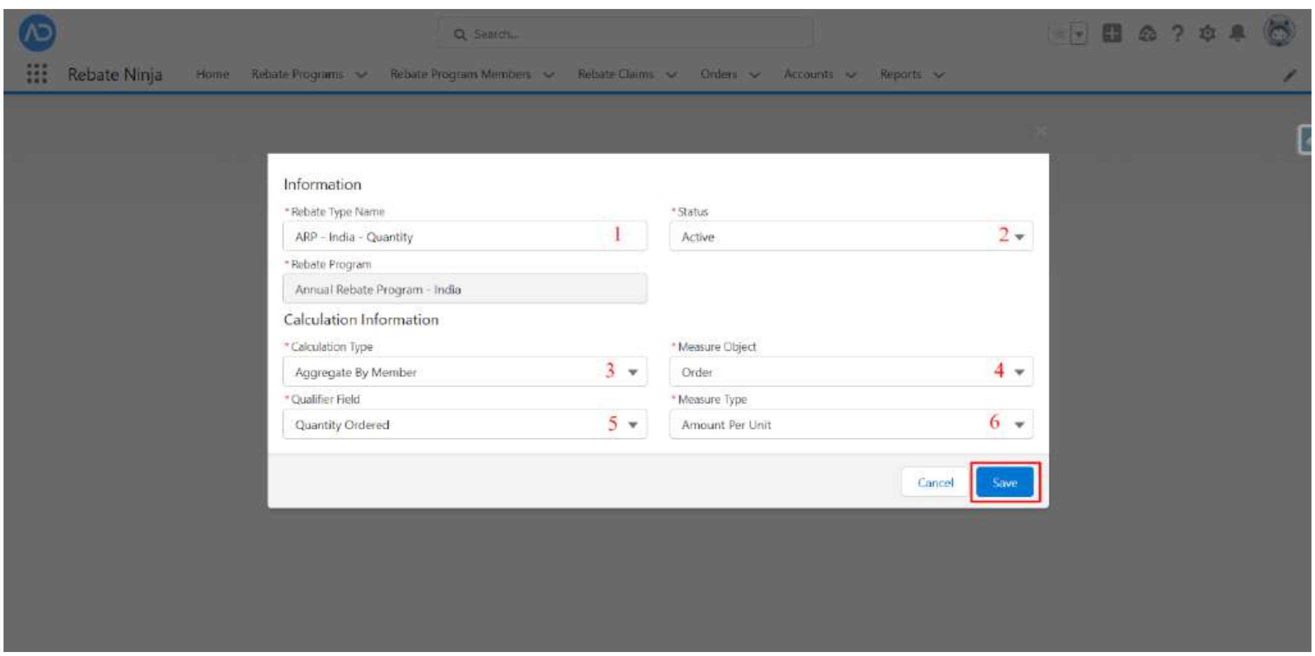
There will be three Rebate Types for a Rebate Program and None will be repeated twice.



The above shows the list of Rebate Types for the Rebate Program. When the User clicks on the "New Rebate Type" button the following popup appears.



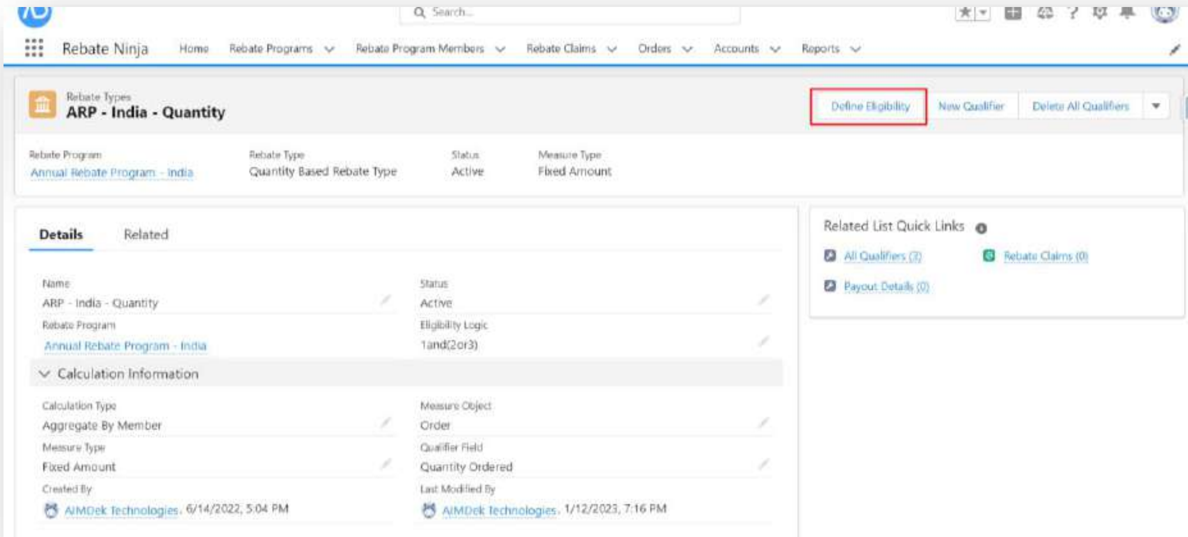
The user needs to select the Rebate Type from the three options and then click on "Next" button.



The user needs to add the details for the Rebate Type that it has selected earlier. And click on the save button.

4.5.1 Rebate Type Details:

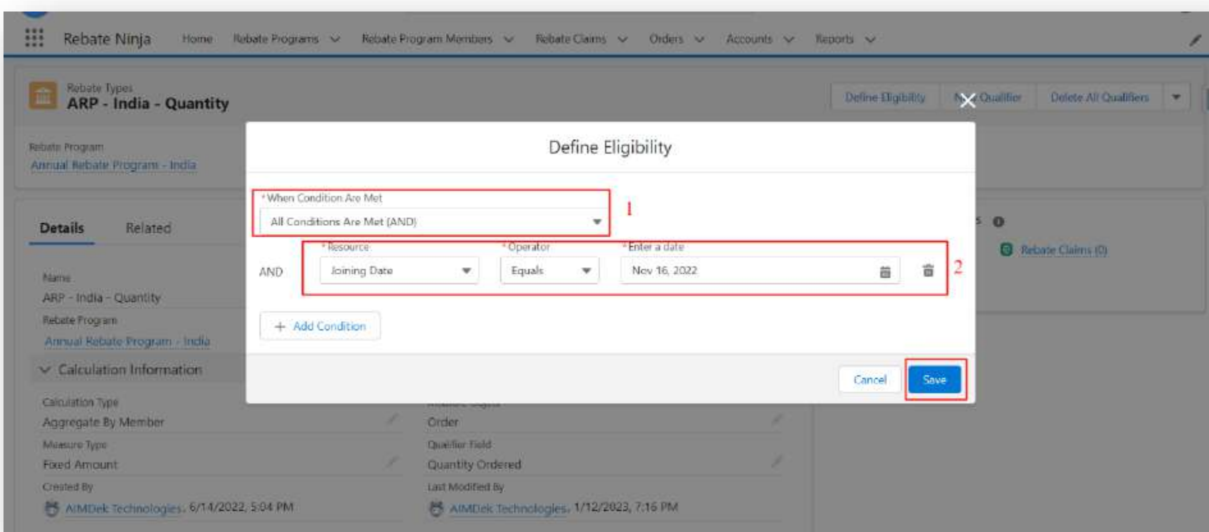
Rebate type details includes details and related tabs. In the details tab it shows calculation information and in “Related” tab “All qualifiers”, “Rebate Claims” and “Payout Details”.



When the user clicks on the “Define Eligibility” button the following popup appears.

4.5.2 Define Eligibility:

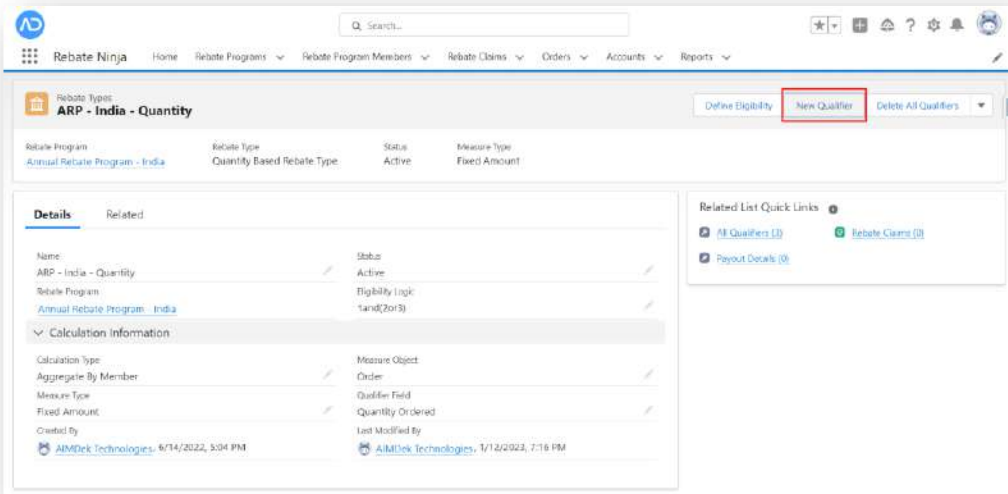
The user needs to add different eligibility conditions so as to make the member eligible if that member has fulfilled the following conditions.



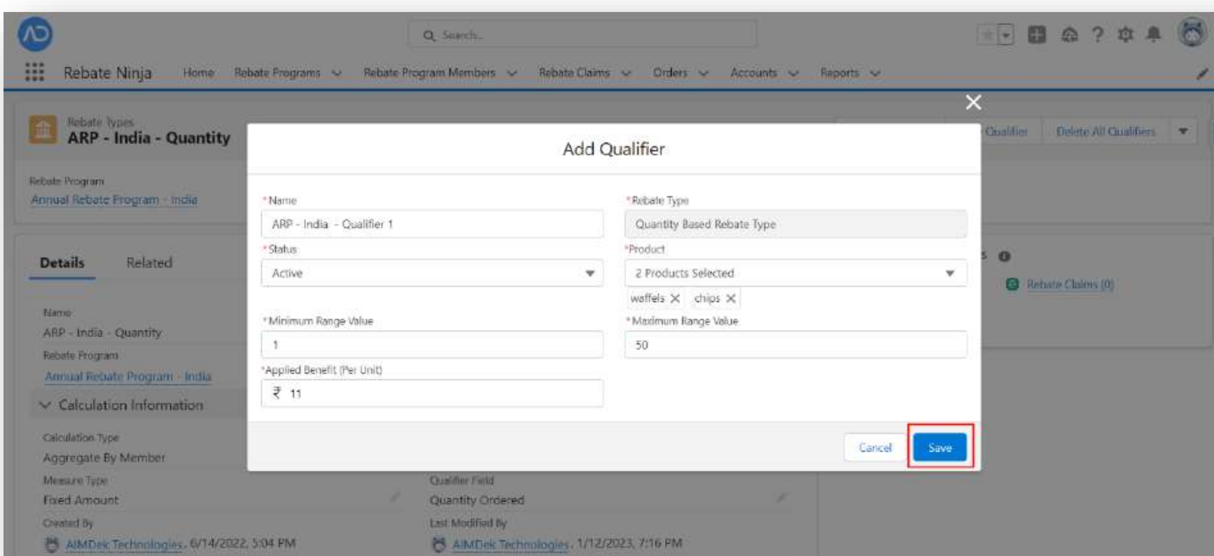
The user first needs to select “When Conditions are met” dropdown and add the conditions as per the requirement. And then click on the save button.

4.5.3 All Qualifiers for the Rebate Type:

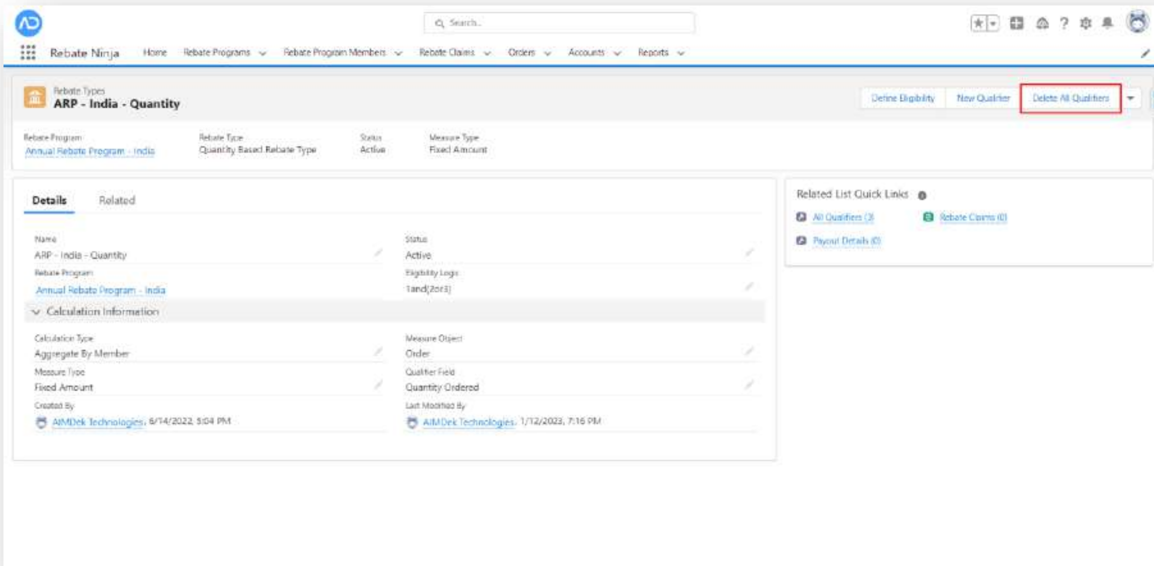
Qualifiers are the criteria for the members products, their revenues and their growth that the user needs to add for the particular Rebate Type. The user needs to add the range of the products and based on that how much benefit it will provide to their users. There will be multiple Qualifiers for the Rebate Type.



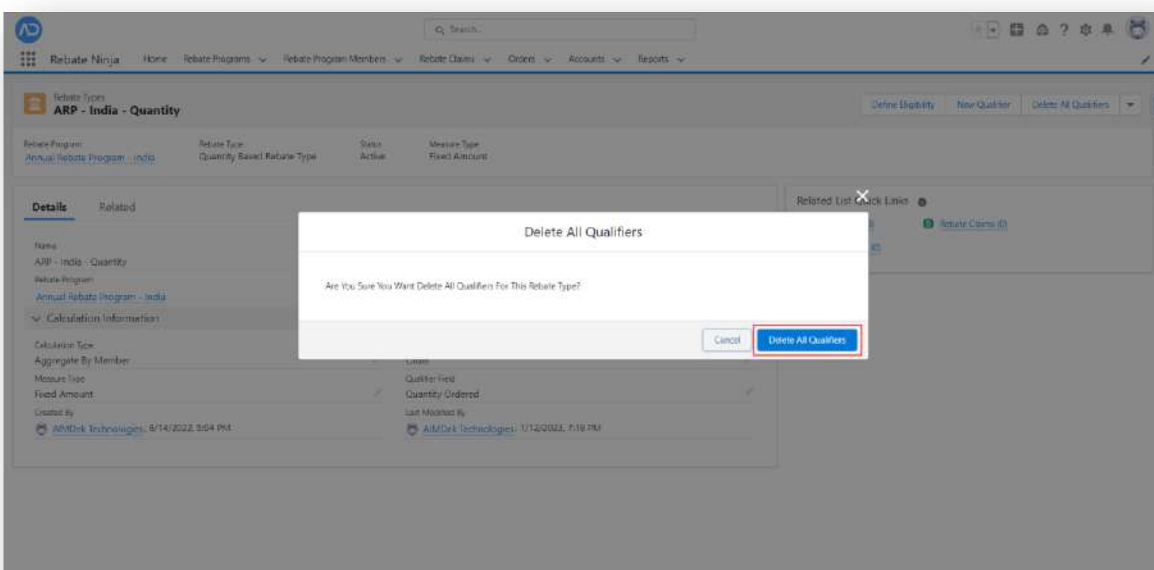
When user clicks on the “New Qualifier” button following popup appears.



The user needs to add the qualifier details as shown above. It includes Minimum Range Value and Maximum Range Value which means the user will need to add range of Quantity for Quantity Based Rebate Type, Total Revenue for Revenue Based Rebate Type and Growth Percent for Growth Based Rebate Type. Then click on the save button.



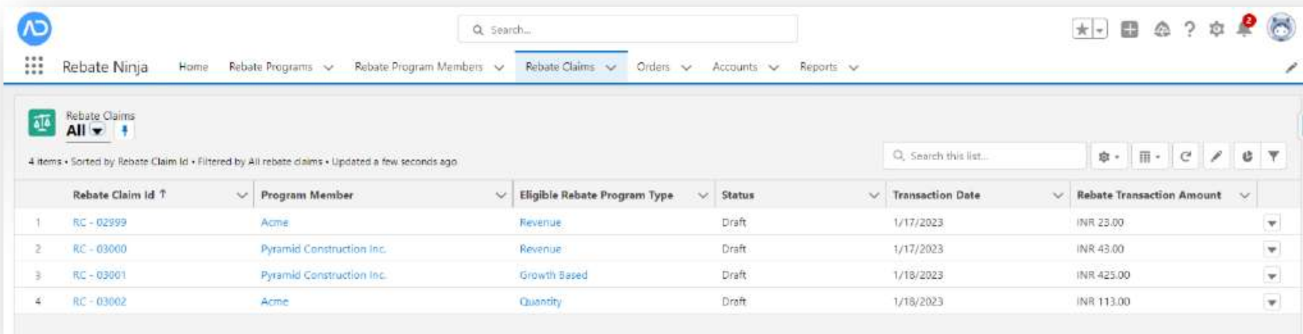
When the user clicks on the "Delete All Qualifiers" button, It will show the following popup.



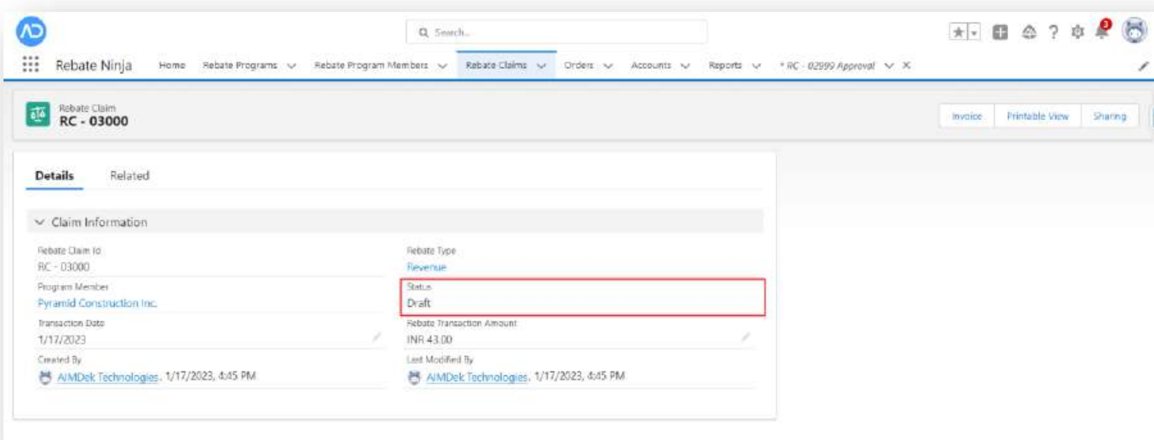
When the user clicks on the “Delete All Qualifiers” button from the popup, it will delete all the related Qualifiers of the Rebate Type at once. The user doesn’t need to delete it one by one as there will be multiple Qualifiers.

4.6 Rebate Claims:

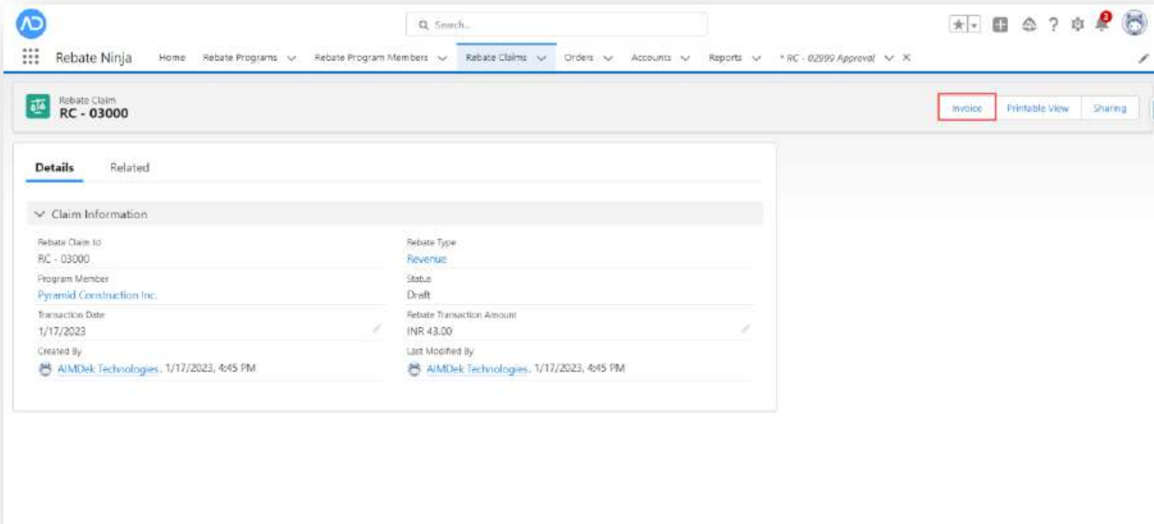
Rebate claims are basically generated for the rebate program members who will be eligible for the Rebate Type wise Rebate Program. It is based on the three different rebate types I.e., Quantity Based, Revenue Based, and Growth Based.



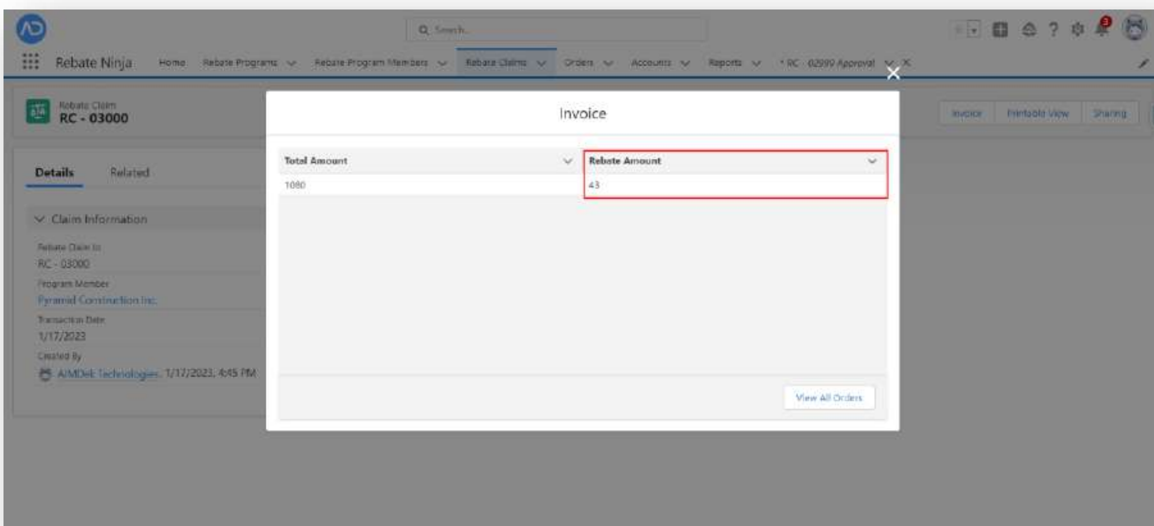
Once the user clicks on “Rebate Claims” Tab from the Navigation Tab, it will show a list of all rebate claims for the rebate program members.



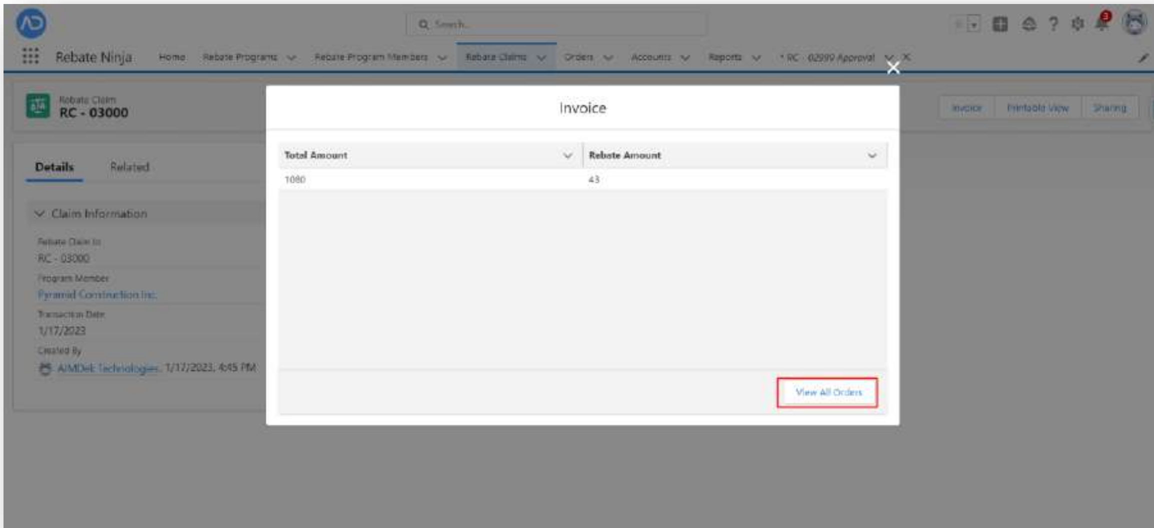
When the Rebate Claim is generated, its status will be set as draft as shown above.



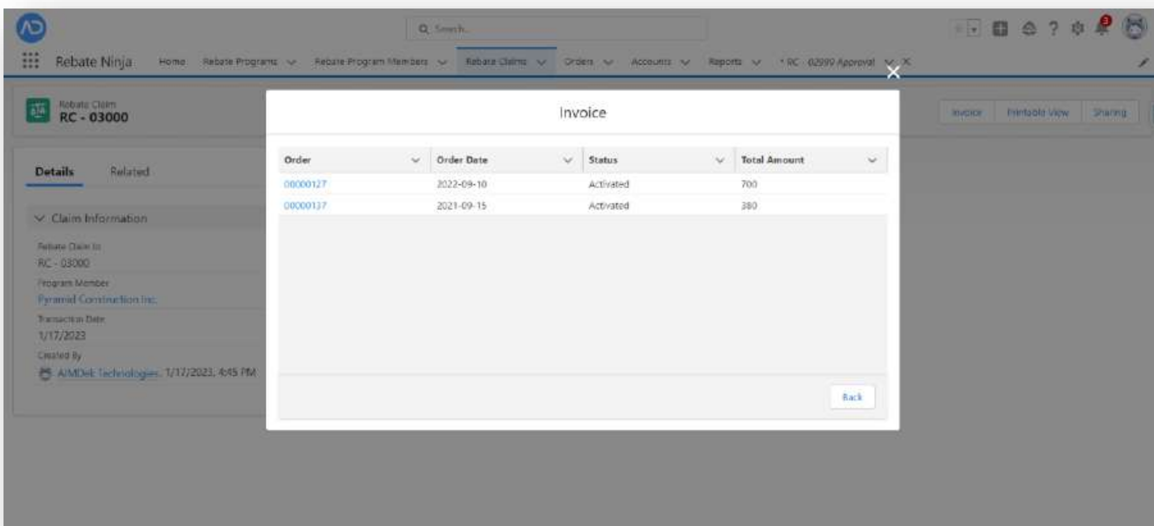
The user can check the Invoice of the generated Rebate Claim to check how the claim is generated. When the user clicks on the "Invoice" button the following popup appears.



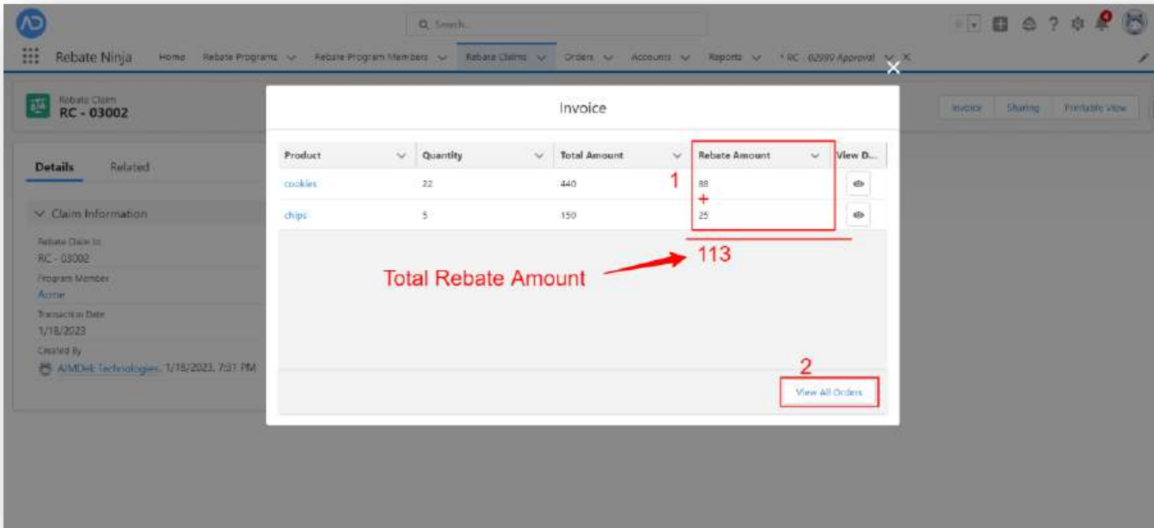
The above figure shows the Rebate Amount of the program member eligible for the Revenue Based Rebate Type.



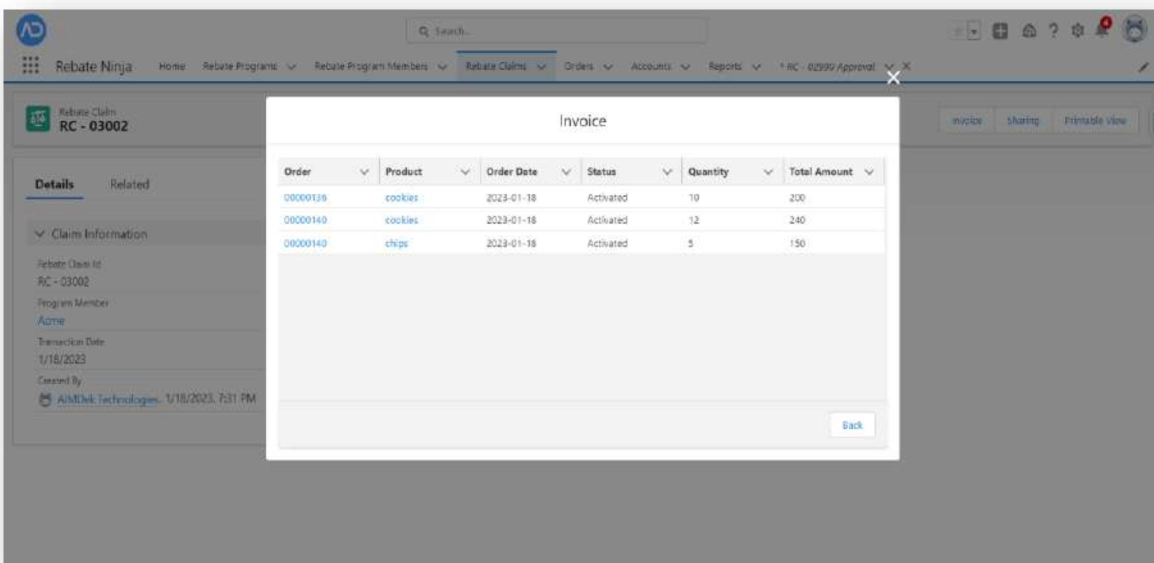
When the user clicks on the “View All Orders” button it will display the Orders Information as shown in the below figure.



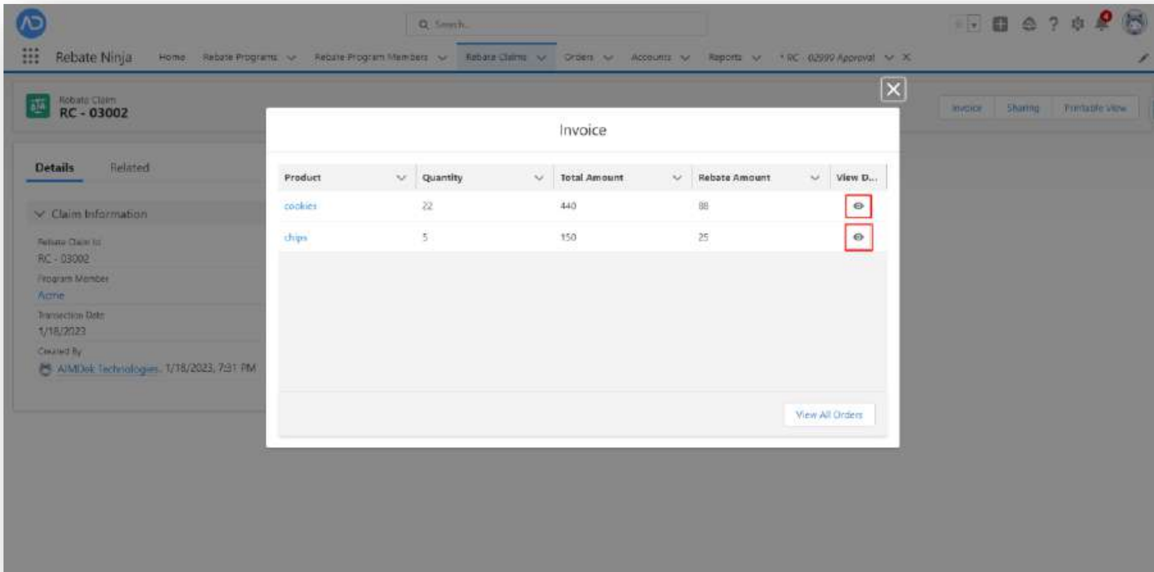
The above figure will show the orders information for the particular member whose claim is generated for the Revenue Based Rebate Type.



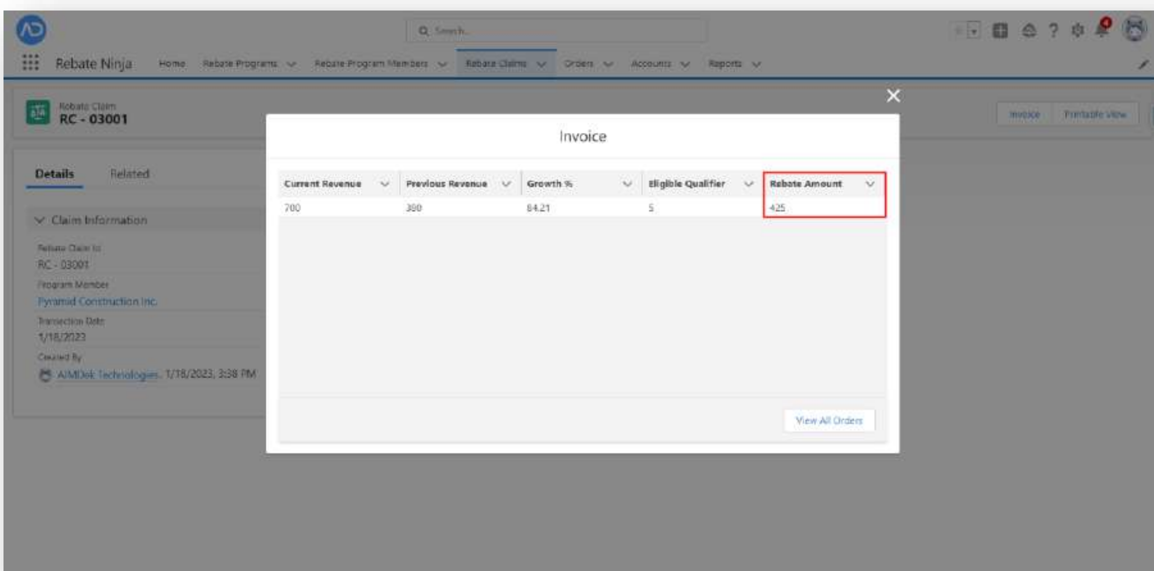
The above figure shows the Rebate Amount of the program member eligible for the Quantity Based Rebate Type. When the user clicks on the "View All Orders" button it will display the Orders Information as shown in the below figure.



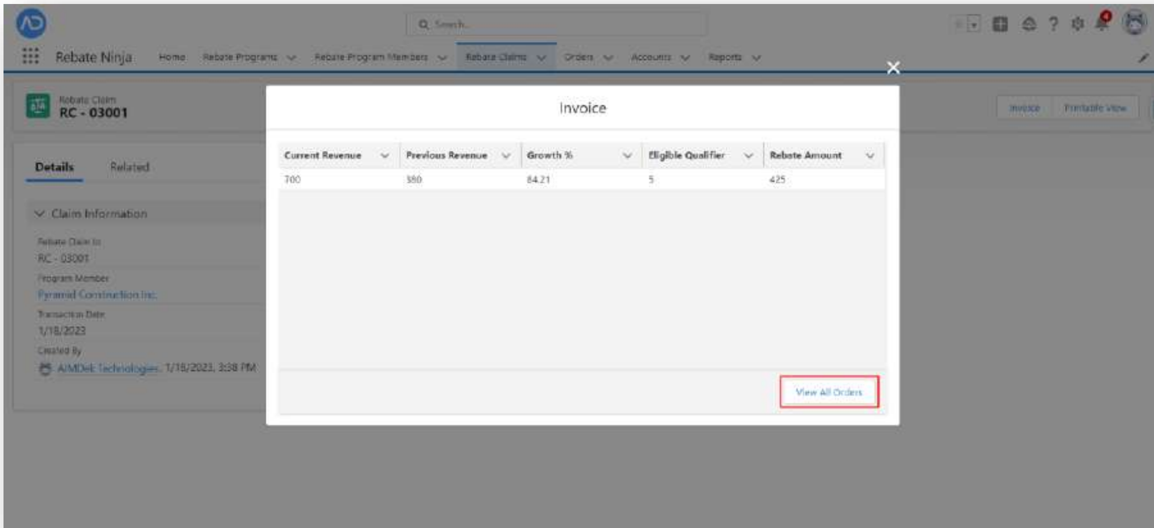
The above figure will show the orders information for the particular member whose claim is generated for the Quantity Based Rebate Type.



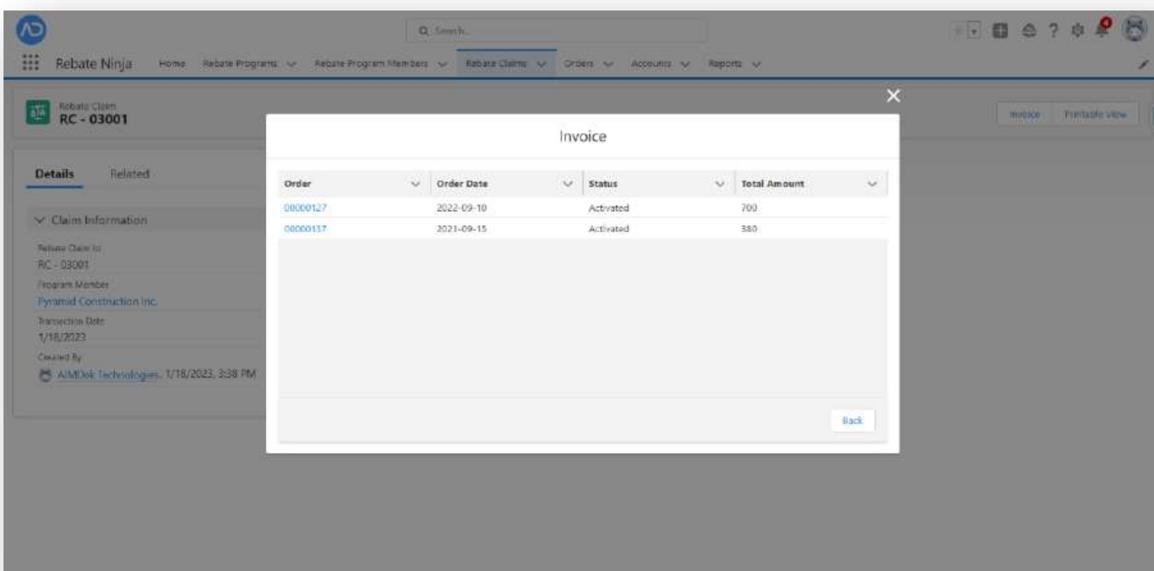
The user can also check the particular product information from the View icon as shown in the above figure.



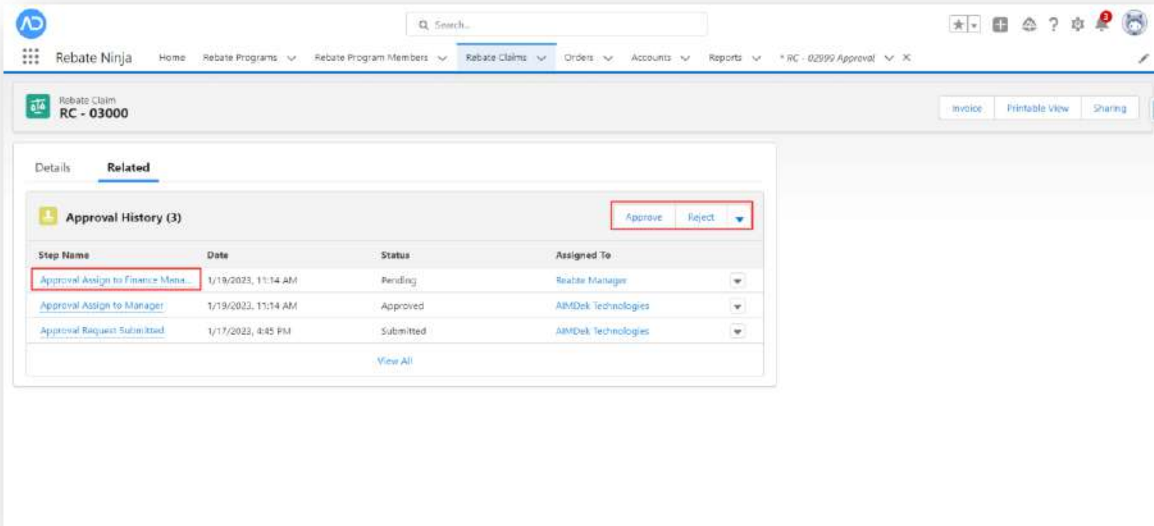
The above figure shows the Rebate Amount of the program member eligible for the Growth Based Rebate Type.



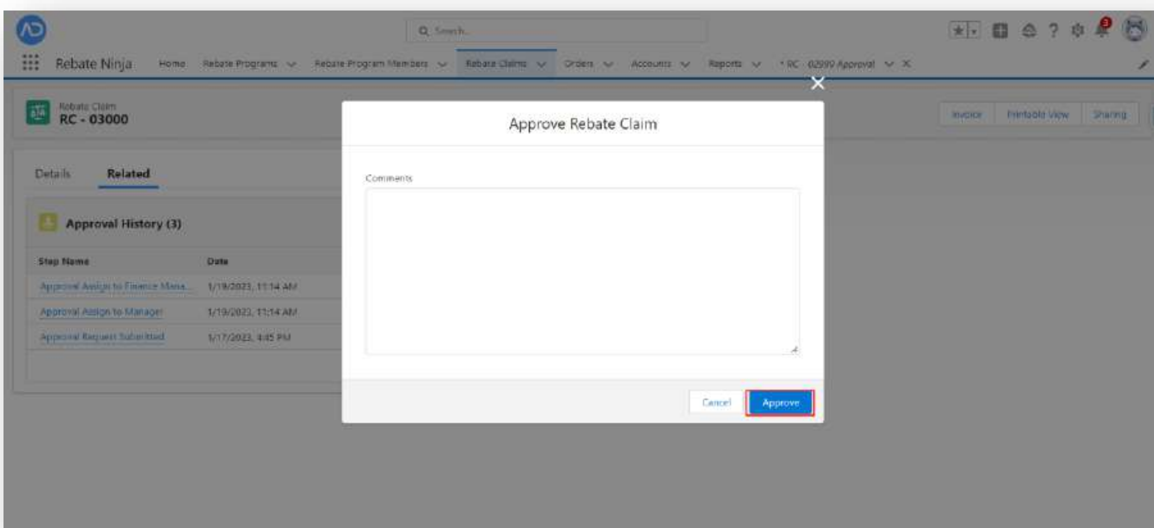
When the user clicks on the "View All Orders" button it will display the Orders Information as shown in the below figure.



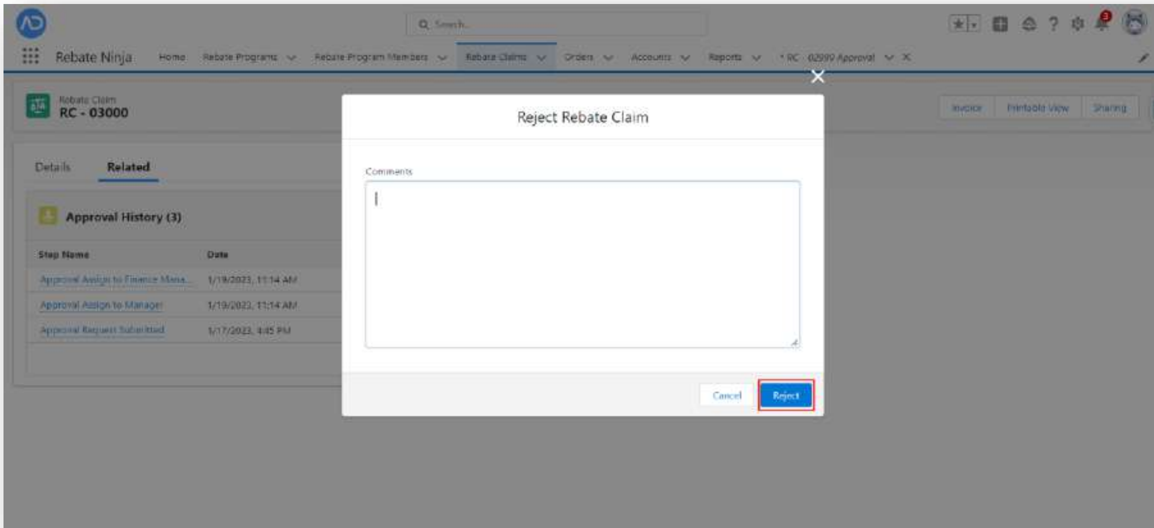
The above figure will show the orders information for the member whose claim is generated for the Growth Based Rebate Type.



When the Rebate Claim is generated, its Approval is assigned to Finance Manager. The Finance Manager will have the right to Approve or Reject the Rebate Claim. Once the Finance Manager approves the Rebate Claim the following popup appears.

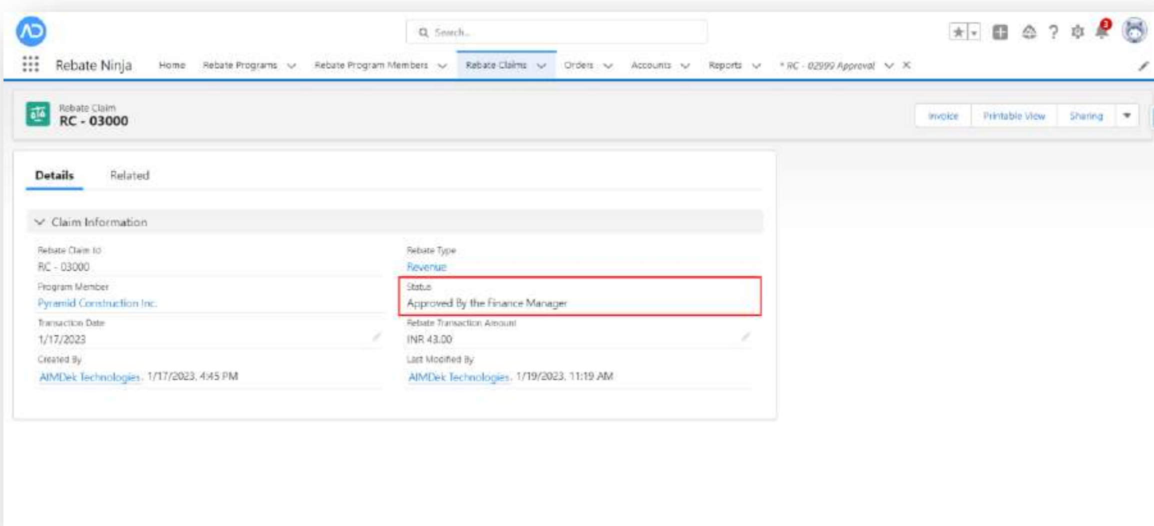


The Finance Manager can add comment for the Approved Rebate Claim and then click on Approve button.

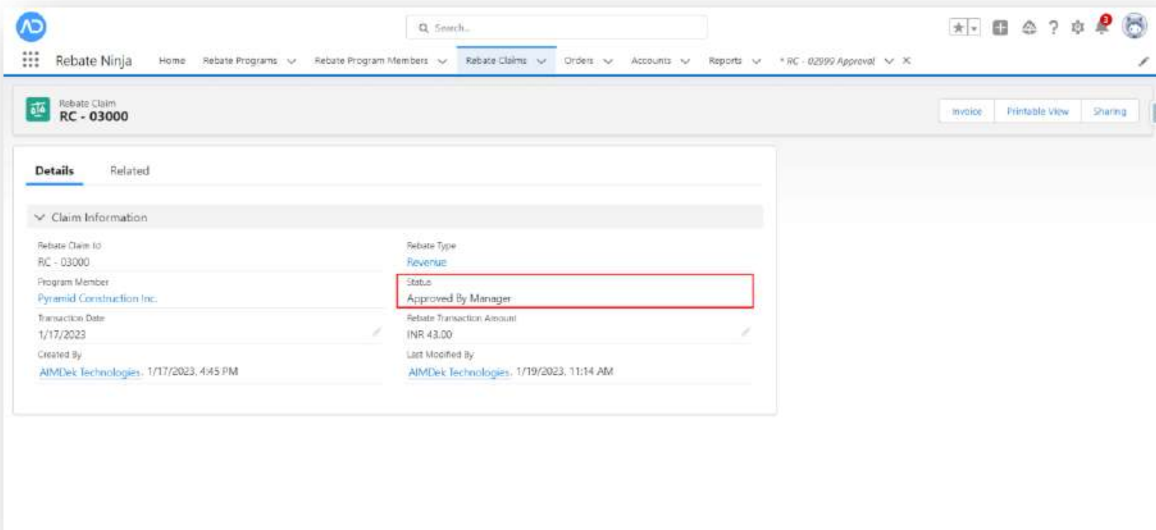


The Finance Manager has the right to Reject the Claim as well. Once he Rejects the Rebate Claim the above popup will appear where the Finance Manager can add comments for the same and then click on Reject button.

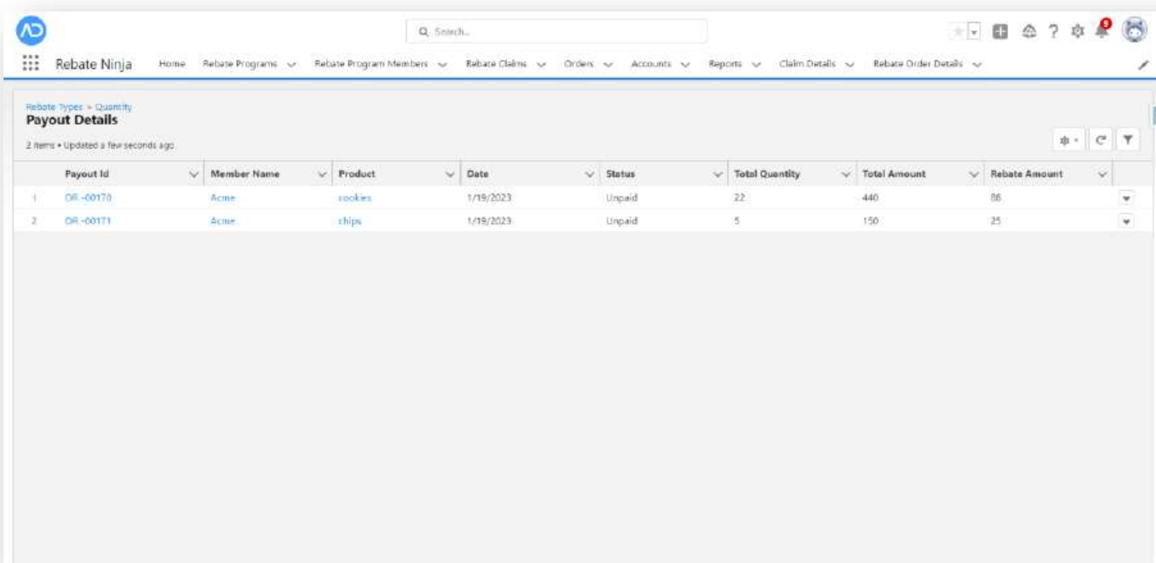
Once it is Rejected it will not go the Manager for the approval. The program member will not receive any Rebate Claim.



Once the Claim is approved by Finance Manager, the status of the Rebate Claim will be set to “Approved by Finance Manager”. Then it will go to the Manager for its Approval. The Manager has also the right to approve or reject the Claim. Once the Manager approves the Claim its Status will be changed to “Approve by Manager”.



Once the Claim is Approved by the Manager, its details will be stored in Payout Details as shown below.



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